WESTERNACHER
LOTUS NOTES E-MAIL-MANAGER
OPERATING MANUAL

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1 SUMMARY

This document describes how to install and configure the Westernacher Lotus Notes E-Mail-Manager for Alfresco.

2 SOFTWARE REQUIREMENTS

- ⇒ Operating system: Windows 7, Windows 8 (incl. 8.1)
- ⇒ Lotus Notes: 8.5.2 / 8.5.3 / 8.5.4 / 9.0.0 / 9.0.1
- ⇒ Alfresco Enterprise 4.2.2, 4.2.1, 4.2.0, 4.1.3 – 4.1.8

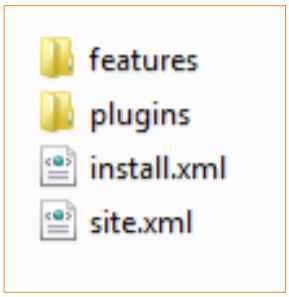
3 INSTALLATION OF THE LOTUS NOTES E-MAIL-MANAGER FOR ALFRESCO

Lotus Notes E-Mail-Manager can be installed in two ways:

- ⇒ from a local directory
- ⇒ from a server (“remote site”)

3.1 DATA STRUCTURE

For the local installation, it is necessary to place the supplied Zip archive in a local directory. For installation from a remote site, the data must be placed on a server that can be reached on the network. It must be possible to use http to reach the directory in which the data is stored. The directory must have the following structure:



Data structure

3.2 CONFIGURATION OF LOTUS NOTES

The following settings must be made in Lotus Notes for both installations:
In the file: <Lotus Notes installation path>\framework\rcp\plug-in_customization.ini
Add (or change): com.ibm.notes.branding/enable.update.ui=true

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3.3 REQUIREMENTS

3.3.1 INSTALLATION FOR TRIAL CUSTOMERS TO TEST IN THE WESTERNACHER CLOUD

In order to test the Lotus Notes E-Mail-Manager without much effort, we provide a pre-configured Alfresco test server in the cloud. The server name and the login information you will get in a separate email. Please proceed as described under **3.4 Installation in Lotus Notes** and enter the license key in **4.4 License Management**.

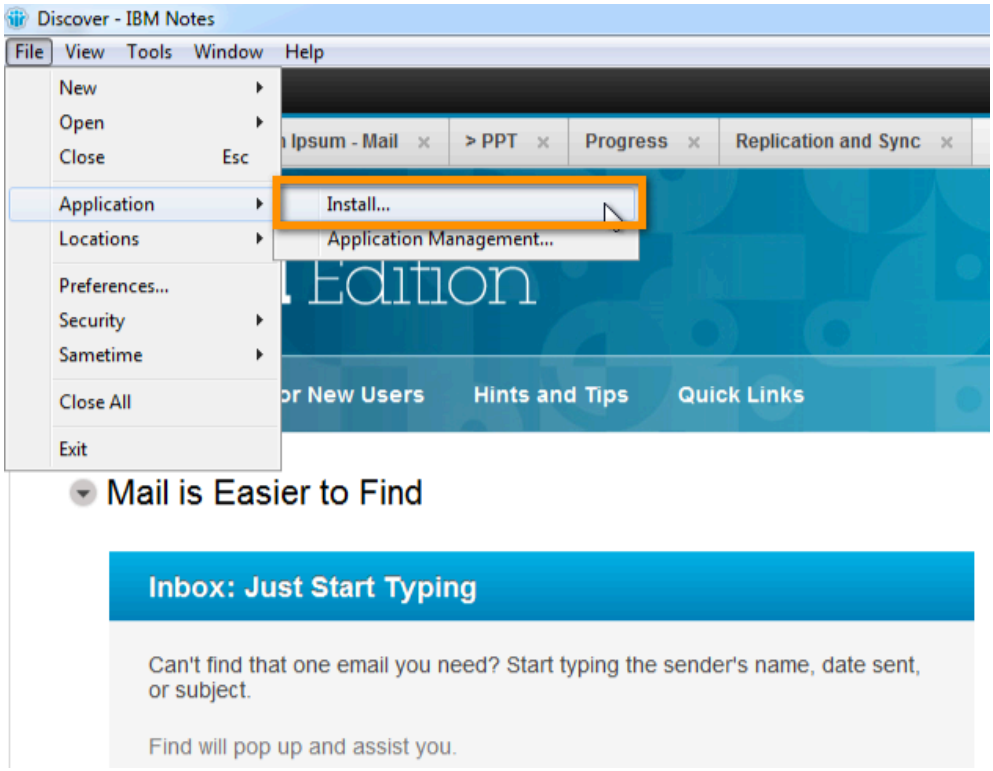
3.3.2 INSTALLING THE FULL VERSION ON YOUR OWN ALFRESCO SERVER

If you have purchased the full version of the Lotus Notes E-Mail-Manager or we will have provided the AMPs to test our plug-in on your own server, it is important that you:

- ⇒ first install the server side (see Appendix) and
- ⇒ enter the licenses of the Lotus Notes E-Mail-Manager in Alfresco Share, before you install the client the Lotus Notes E-Mail-Manager (see **8.3 Email licenses**)

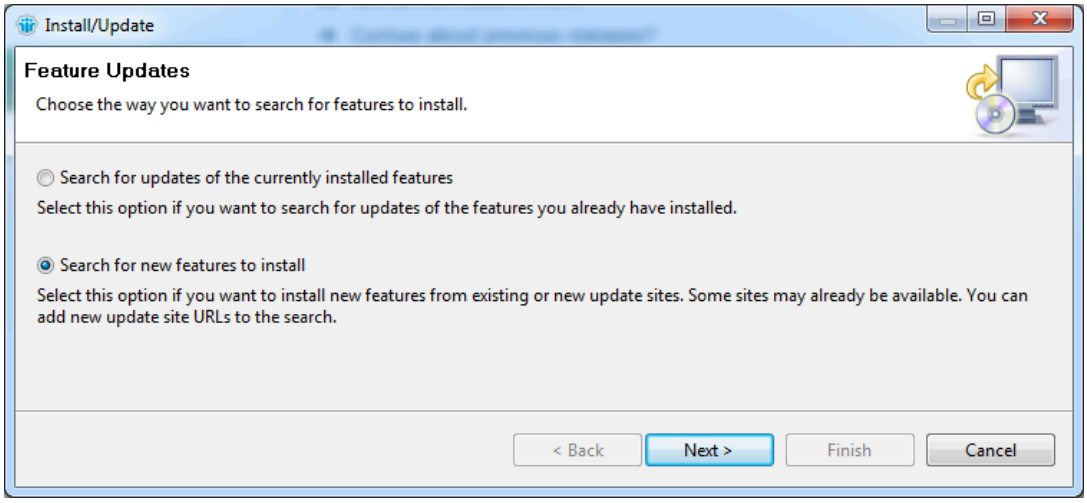
3.4 INSTALLATION IN LOTUS NOTES

Go to “File / Application / Install” in Lotus Notes. This option is not activated by default in Lotus Notes. In order to activate this option for Lotus Notes, perform the steps from “**3.3 Installation in Lotus Notes**”.



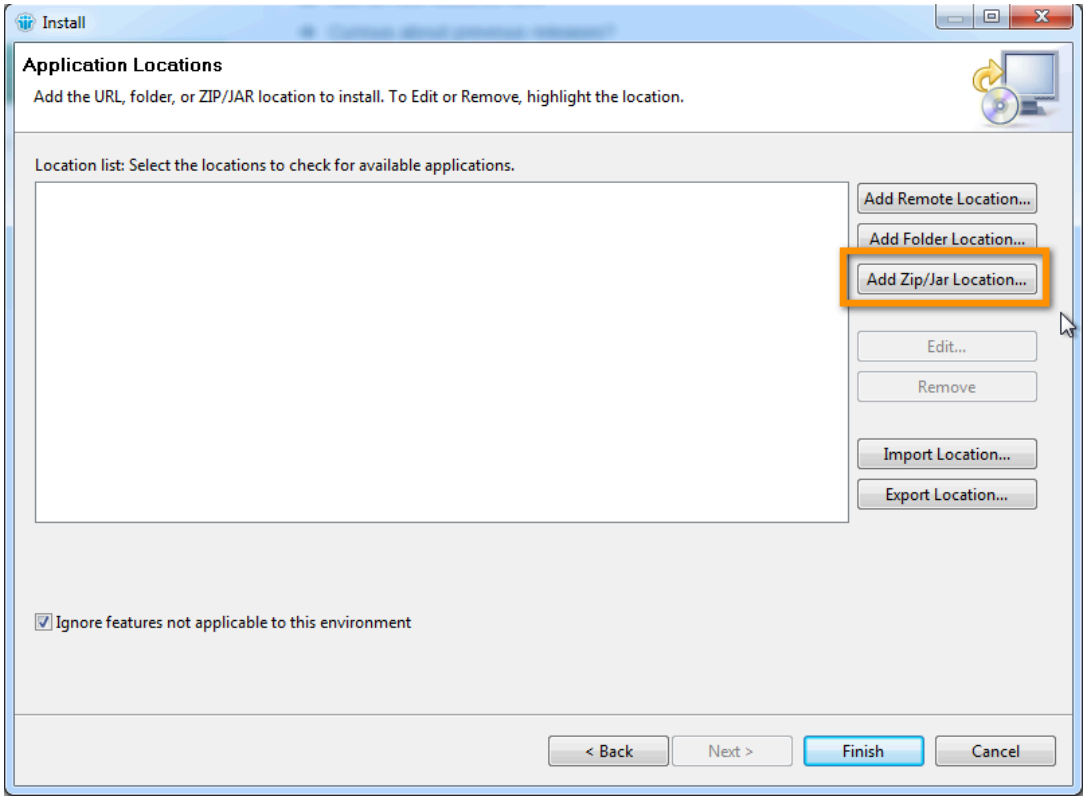
Install new application

Select: “Search for new features to be installed”


Install/Update
Feature Updates
Choose the way you want to search for features to install.
Search for updates of the currently installed features
Select this option if you want to search for updates of the features you already have installed.
Search for new features to install
Select this option if you want to install new features from existing or new update sites. Some sites may already be available. You can add new update site URLs to the search.
< Back
Next >
Finish
Cancel

Search for new aplications tob e installed

The dialogue box for selecting the installation source then appears:



Installation source 1

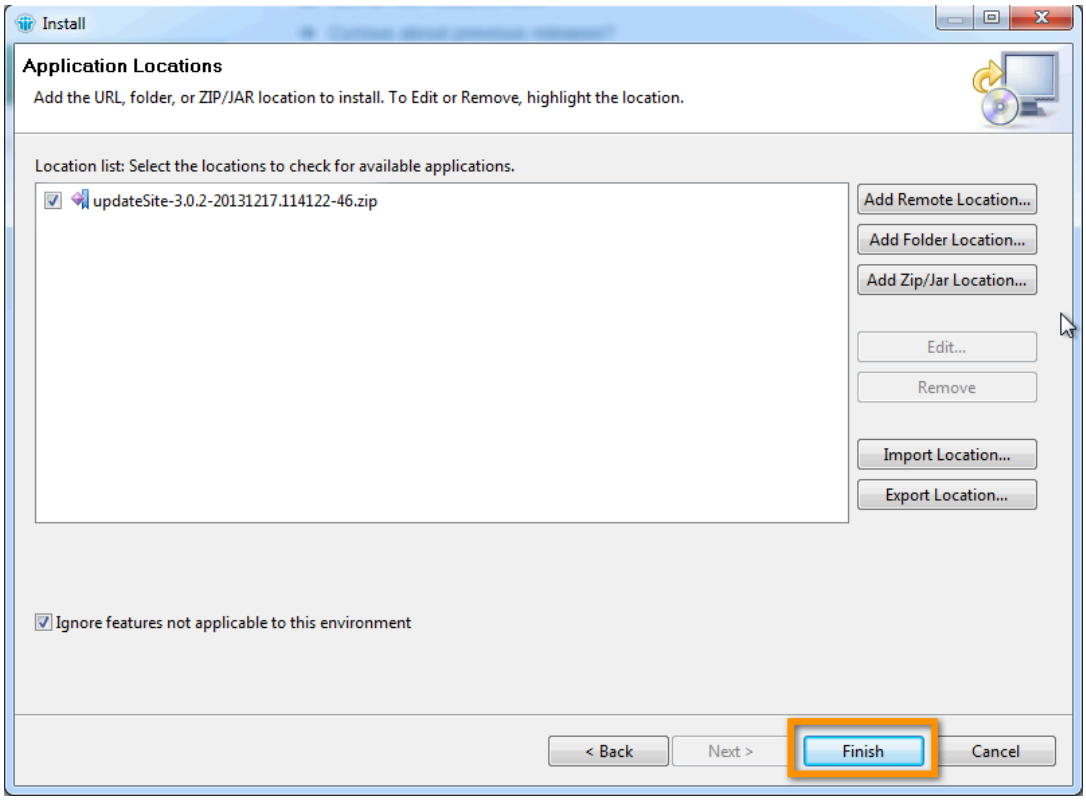
3.4.1 LOCAL INSTALLATION

To install from a local directory, click on: “Add Zip/Jar item…“ and select the installation archive (see 2.2).

3.4.2 REMOTE-SITE INSTALLATION

To install from a remote site, click on: "Add remote item..." and, in the "URL" field, enter the URL of the network directory in which the plug-in installation files were saved (see **3.2 Data Structure**). e.g.: http://myinstallationsserver/software/alfresco_lotus_plugin

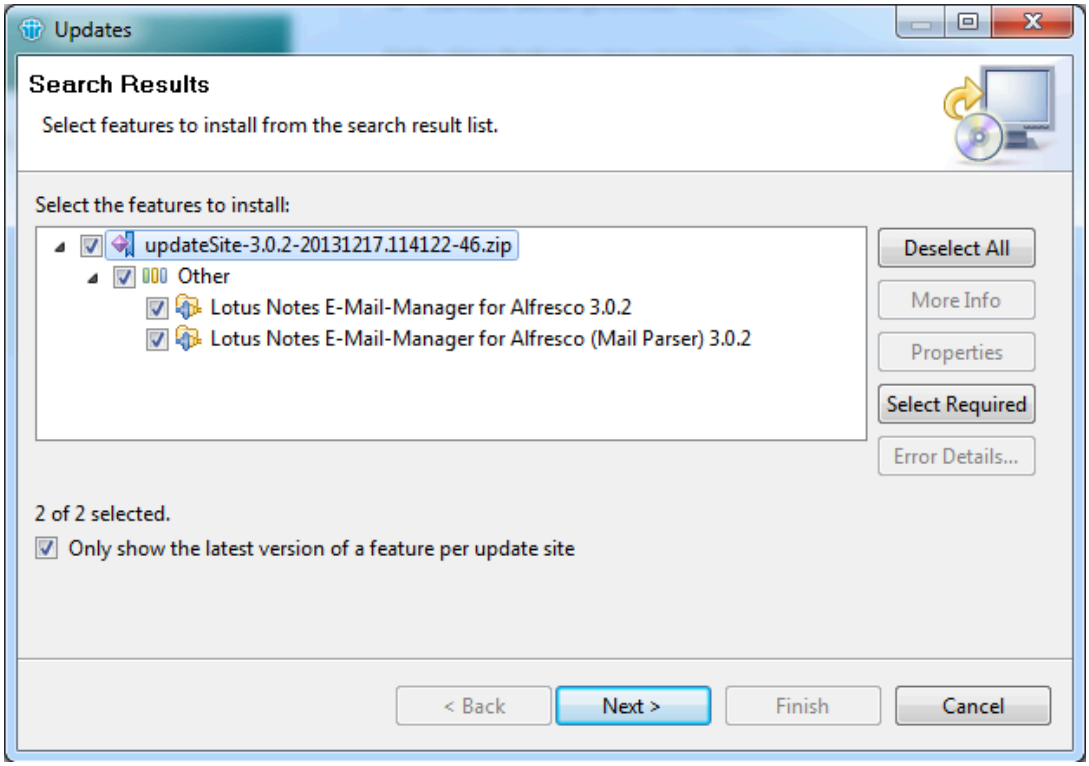
Once you have selected the correct installation storage location (local/remote), the following dialogue box appears: Click "Finish".



Installation source 2

Then click "Finish".

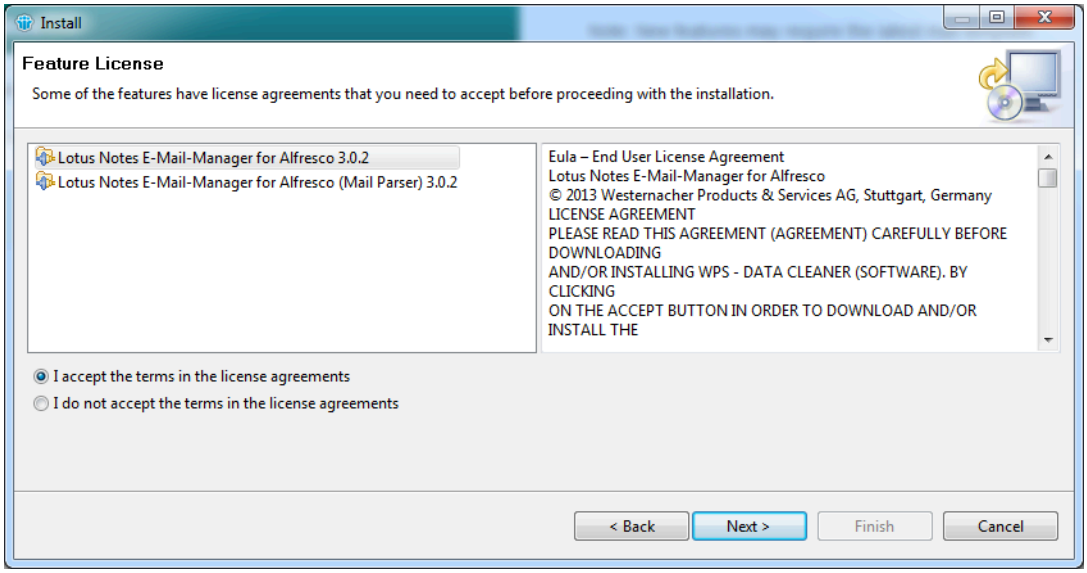
Overview of the Lotus Notes features to be installed:



Select Lotus Notes Features

Select all of them and click “Next”

The licence agreement is shown in the next dialogue box.


Install
Feature License
Some of the features have license agreements that you need to accept before proceeding with the installation.
Lotus Notes E-Mail-Manager for Alfresco 3.0.2
Lotus Notes E-Mail-Manager for Alfresco (Mail Parser) 3.0.2
Eula – End User License Agreement
Lotus Notes E-Mail-Manager for Alfresco
© 2013 Westernacher Products & Services AG, Stuttgart, Germany
LICENSE AGREEMENT
PLEASE READ THIS AGREEMENT (AGREEMENT) CAREFULLY BEFORE DOWNLOADING
AND/OR INSTALLING WPS - DATA CLEANER (SOFTWARE). BY CLICKING
ON THE ACCEPT BUTTON IN ORDER TO DOWNLOAD AND/OR INSTALL THE
I accept the terms in the license agreements
I do not accept the terms in the license agreements
< Back
Next >
Finish
Cancel

Licence agreement

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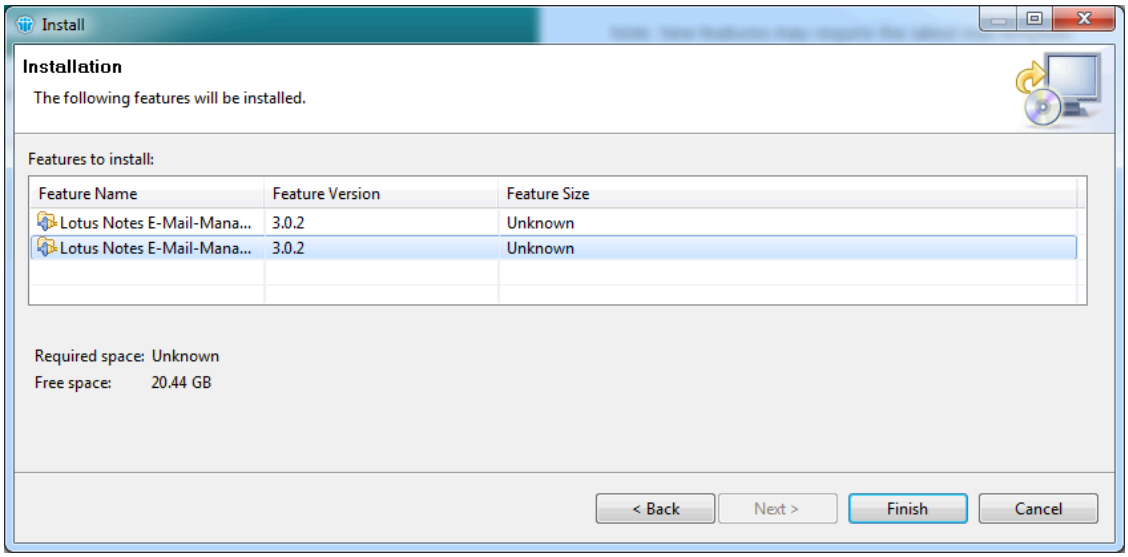
If you accept the licence agreement from Westernacher Products & Services AG, Stuttgart, select the corresponding radio button and click “Next >”.

The plug-in version is shown in the next dialogue box.



Version of the Integration to be installed

Click “Finish” to complete the plug-in installation (Lotus Notes must be restarted). Each of the last two steps includes a system warning.

If you wish to install the plug-in, select the appropriate radio button twice and click 'OK". Please restart Lotus Notes after finishing.

3.5 UNINSTALLING LOTUS NOTES

Change to “File / Application / Application Management” in Lotus Notes.

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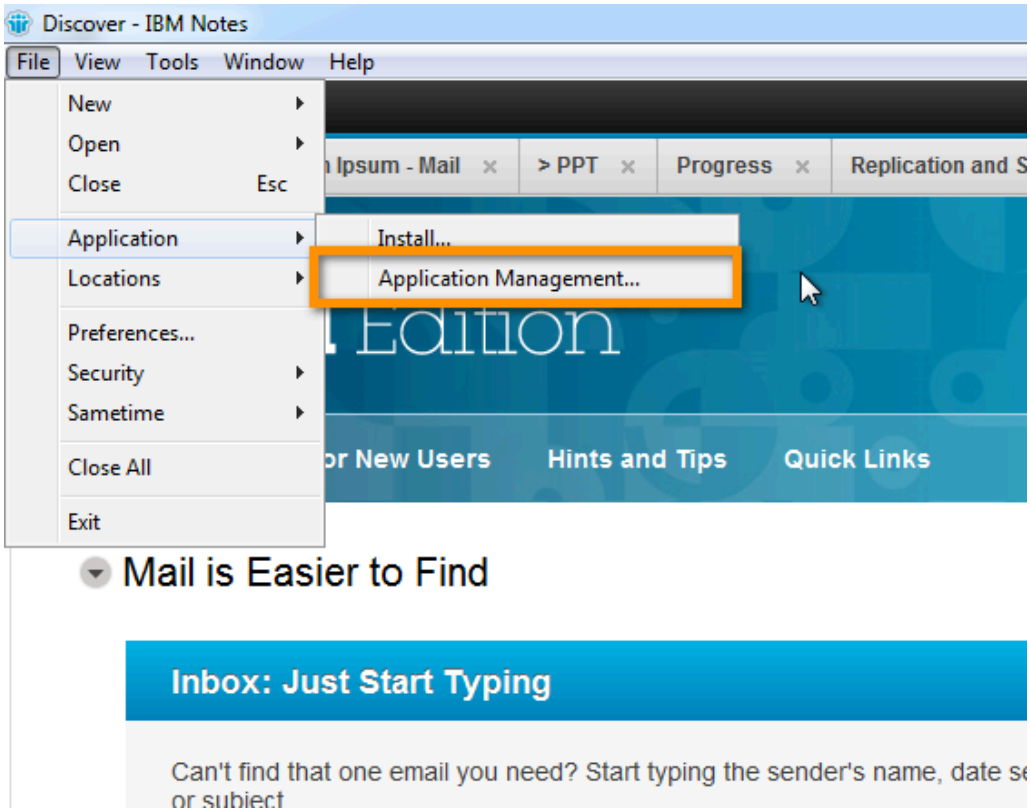
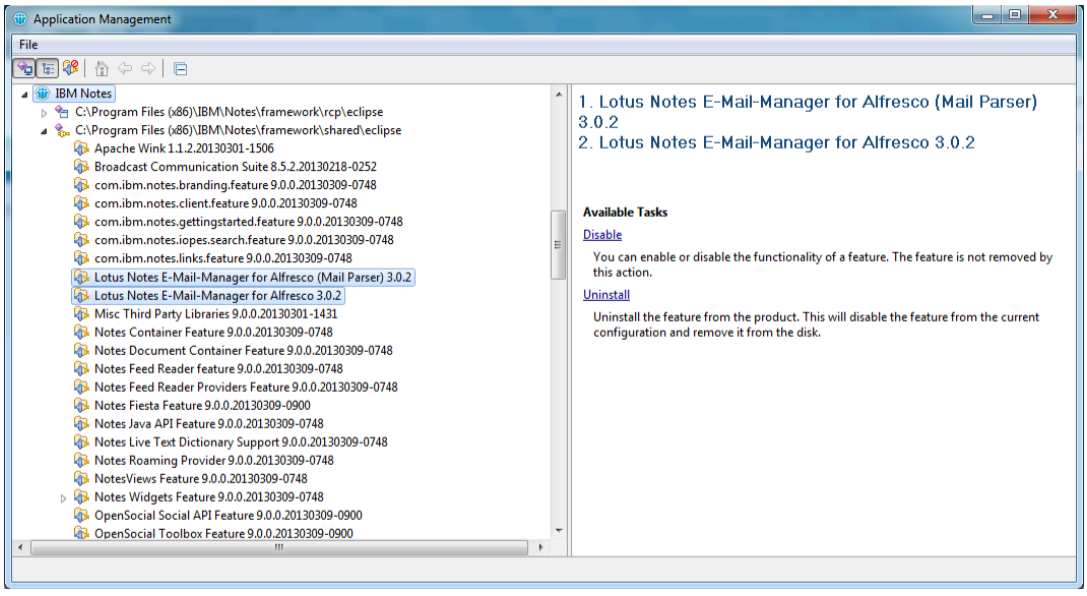


Application Management

Uninstall all Westernacher features (requires Lotus Notes to be restarted after each uninstall):


Application Management
File
IBM Notes
C:\Program Files (x86)\IBM\Notes\framework\rcp\eclipse
C:\Program Files (x86)\IBM\Notes\framework\shared\eclipse
Apache Wink 1.1.2.20130301-1506
Broadcast Communication Suite 8.5.2.20130218-0252
com.ibm.notes.branding.feature 9.0.0.20130309-0748
com.ibm.notes.client.feature 9.0.0.20130309-0748
com.ibm.notes.gettingstarted.feature 9.0.0.20130309-0748
com.ibm.notes.iopes.search.feature 9.0.0.20130309-0748
com.ibm.notes.links.feature 9.0.0.20130309-0748
Lotus Notes E-Mail-Manager for Alfresco (Mail Parser) 3.0.2
Lotus Notes E-Mail-Manager for Alfresco 3.0.2
Misc Third Party Libraries 9.0.0.20130301-1431
Notes Container Feature 9.0.0.20130309-0748
Notes Document Container Feature 9.0.0.20130309-0748
Notes Feed Reader feature 9.0.0.20130309-0748
Notes Feed Reader Providers Feature 9.0.0.20130309-0748
Notes Fiesta Feature 9.0.0.20130309-0900
Notes Java API Feature 9.0.0.20130309-0748
Notes Live Text Dictionary Support 9.0.0.20130309-0748
Notes Roaming Provider 9.0.0.20130309-0748
NotesViews Feature 9.0.0.20130309-0748
Notes Widgets Feature 9.0.0.20130309-0748
OpenSocial Social API Feature 9.0.0.20130309-0900
OpenSocial Toolbox Feature 9.0.0.20130309-0900
1. Lotus Notes E-Mail-Manager for Alfresco (Mail Parser) 3.0.2
2. Lotus Notes E-Mail-Manager for Alfresco 3.0.2
Available Tasks
Disable
You can enable or disable the functionality of a feature. The feature is not removed by this action.
Uninstall
Uninstall the feature from the product. This will disable the feature from the current configuration and remove it from the disk.

Uninstalling

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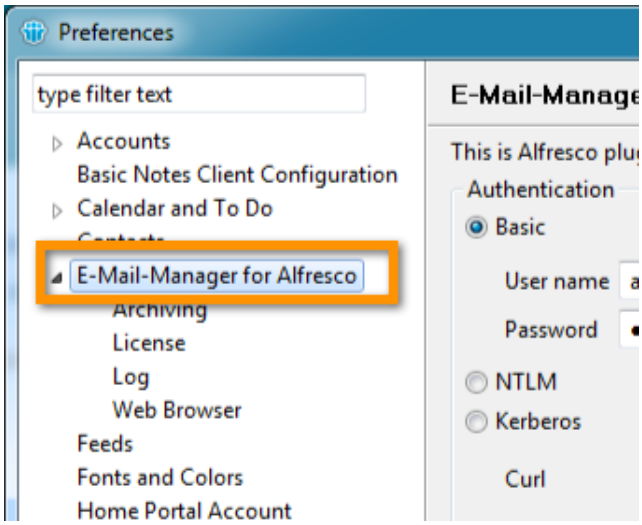
4 SETTING UP THE ALFRESCO LOTUS NOTES E-MAIL-MANAGER

After installation, a new area will become visible in Lotus Notes, Alfresco Explorer.

Alfresco Explorer

The configuration dialogue box can also be accessed through the Lotus Notes configuration console. File → Preferences → Email Manager for Alfresco



User preferences

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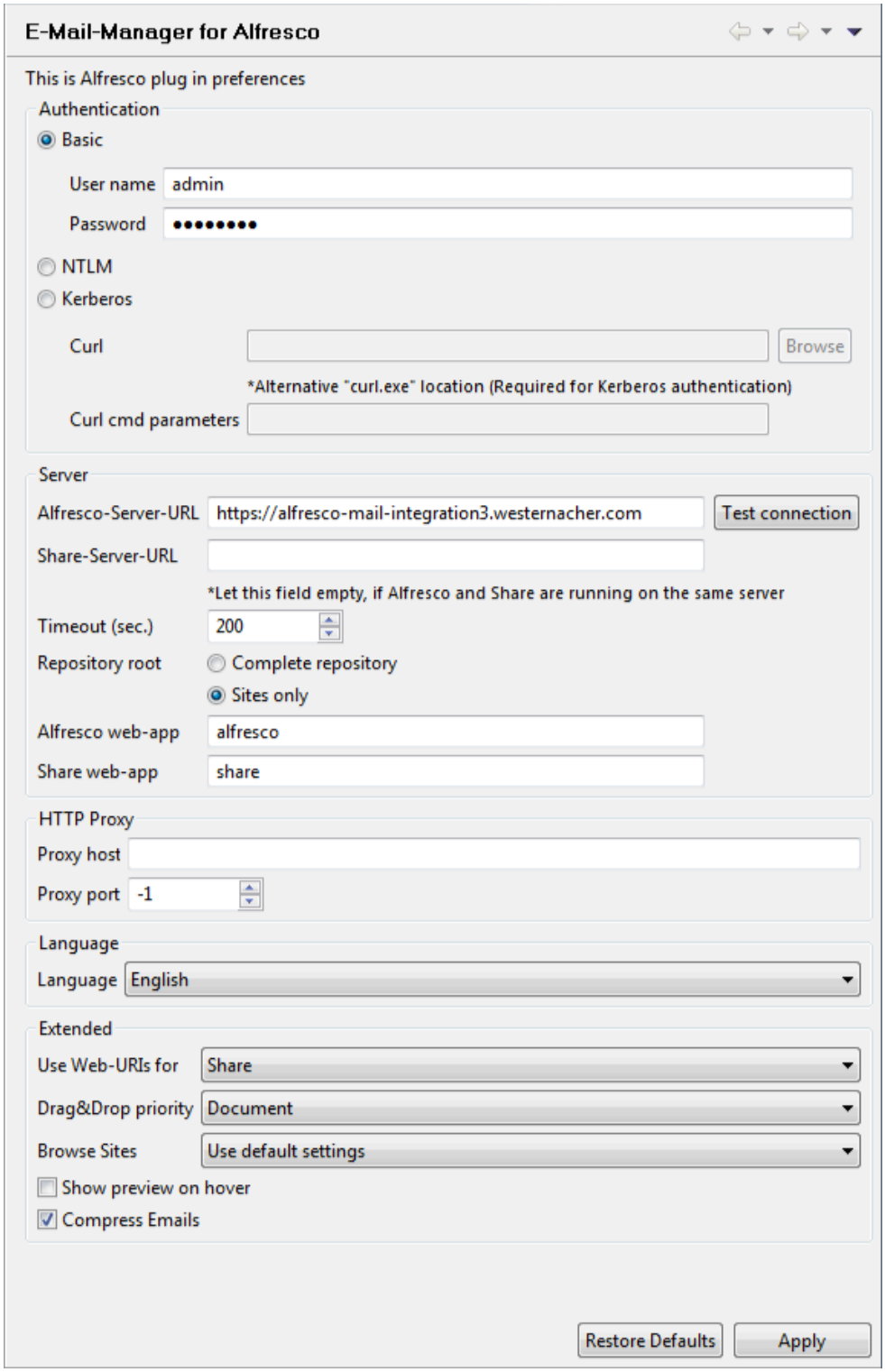

Overview of Alfresco-Explorer

Alfresco Explorer is explained below in detail.

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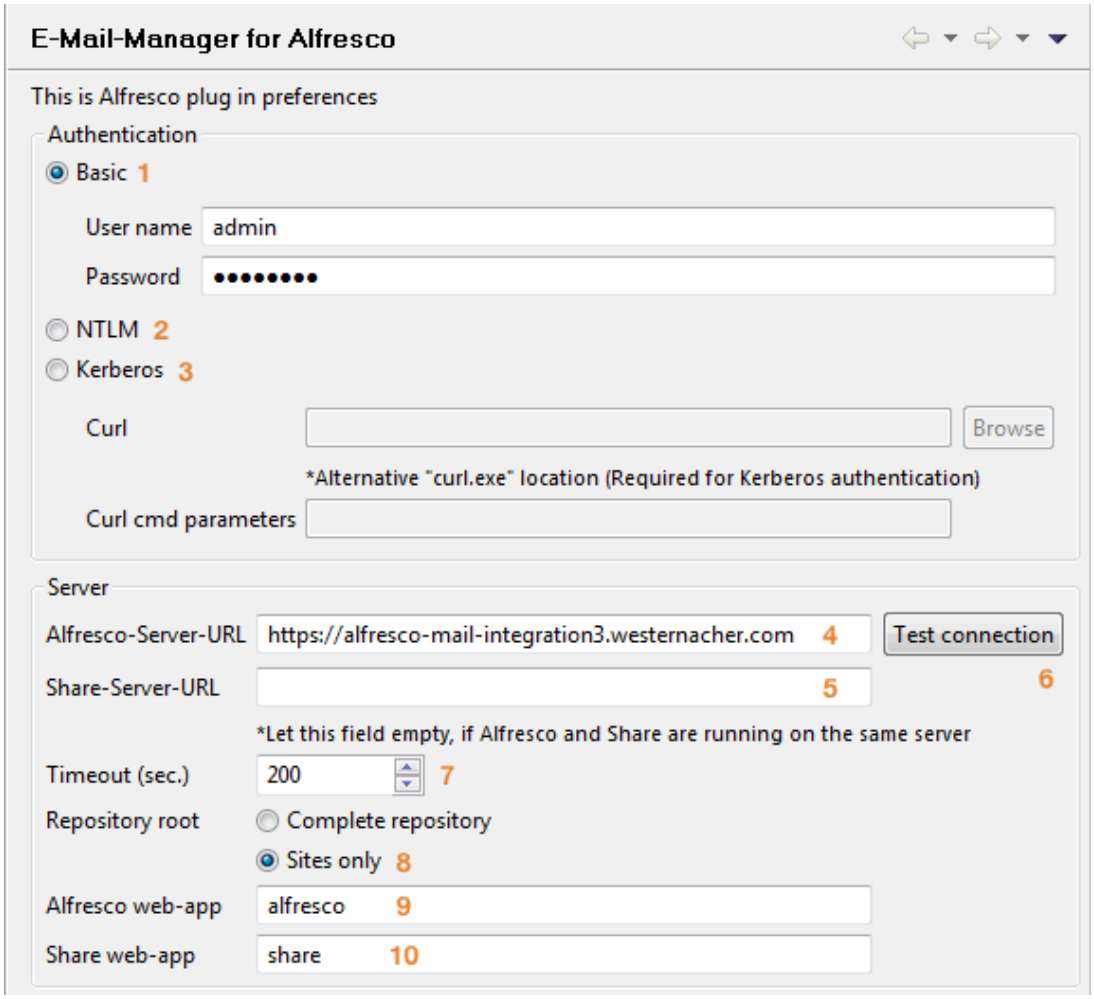
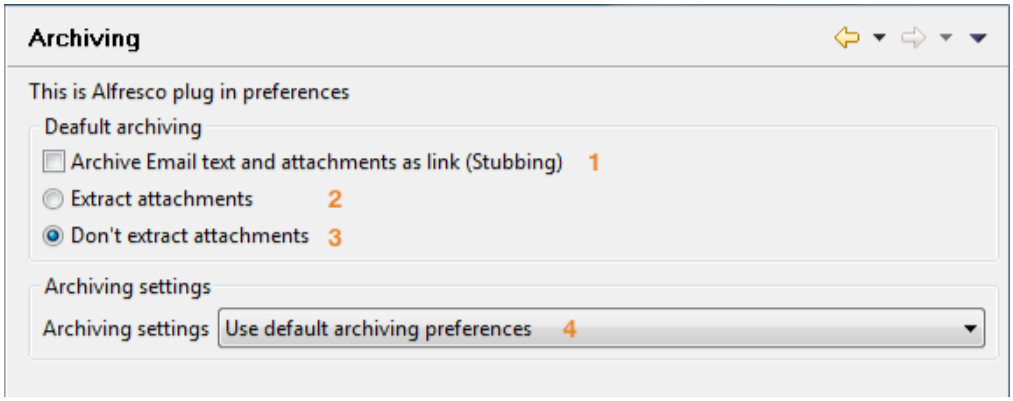
4.1 CONNECTING TO THE ALFRESCO SERVER



System settings configuration

1 Standard login with username and password.
2 If using a ‘single sign on’ (SSO), NTLM authentication will be used.
3 If using a Kerberos ‘single sign on’ (SSO), NTLM authentication will be used.
4 URL to the Alfresco server.
5 URL to the Alfresco web application.
6 Alfresco server connection test.
7 Timeout for communication with the Alfresco server
8 Select whether Alfresco Explorer should start with “Sites” or “All Alfresco".
9 Name of the Alfresco Explorer web application.
10 Name of the Share web application.



Archive settings

1 **Default archive settings** – various combinations can be selected:

⇒ **Archive as links**: The original emails are saved in Lotus Notes only as links to the content in Alfresco.

⇒ **Save attachments as separate documents**: Specifies whether or not email attachments are saved as separate documents in Alfresco during archiving.

2 **Additional email archive settings** – one of the following settings can be selected using the radio buttons:

⇒ **Use default settings**: All emails will be saved on the Alfresco server according to the settings specified in the archive settings (1).

⇒ **Enter metadata when archiving**: This setting specifies whether the emails are to be tagged during archiving. See 5.1 'Drag & drop emails' into a directory in Alfresco Explorer.

⇒ **Show settings when archiving**: This allows you to select how each individual email should be archived. You will be given the same options as offered here in default archiving (1).

4.1.1 ARCHIVING AS LINK

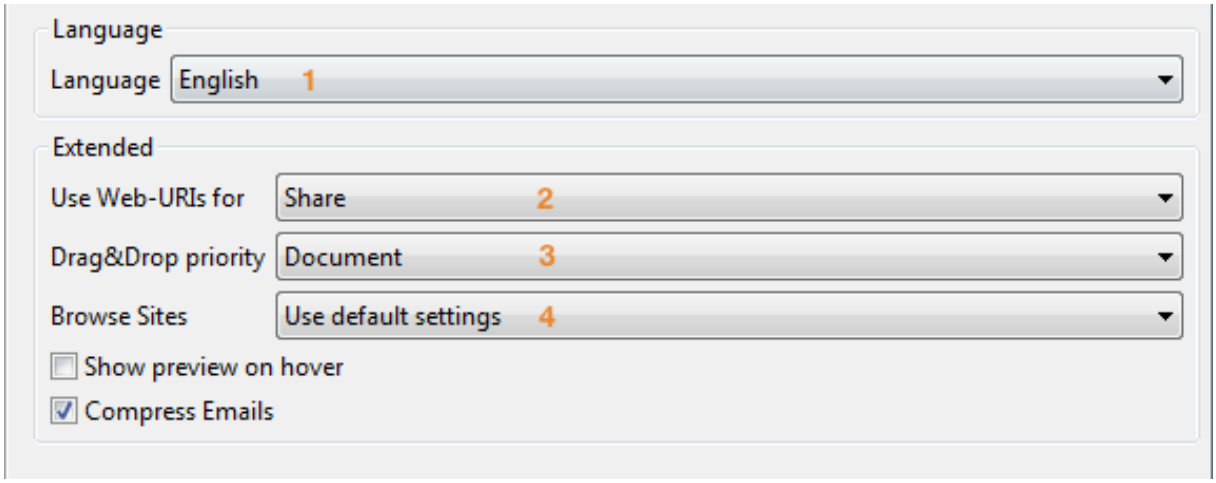
In order to reduce the size of the inbox, you can archive Lotus Notes emails as links to the content in Alfresco. In the process, the emails

⇒ are saved in their entirety (original EML file) in Alfresco

⇒ are saved only in part (without text and attachments) in Lotus Notes

Lotus Notes emails contain (in the text) a link to the original message in Alfresco.
IMPORTANT: After archiving, the original message ONLY exists in Alfresco!

4.2 ADDITIONAL SETTINGS



Additional Settings

1 **Change the UI language**: At the moment, German, English and Norwegian are available.
2 Controls the target application for calling up a browser directly from Lotus Notes:
   - Web client: Alfresco Explorer
   - Share: Alfresco Share
3 Defines the priority for "**Drag & Drop from Alfresco**":
   - **Document**: With drag & drop, files from Alfresco are attached to the email as binary attachments. If the Strg button is held down, files from Alfresco are linked to the email as HTTP links.
   - **Link**: With drag & drop, files from Alfresco are assigned to the email as HTTP links. If the Strg button is held down, files from Alfresco are added to the email as binary attachments.
4 **Site to browse in the standard view, changable everytime via dropdown menu.**
   - All Sites
   - My Sites
   - Favorite Sites

4.3 CONFIGURATION TEMPLATES

Configuration templates can make the initial configuration of the Lotus Notes E-Mail-Manager easier.

4.3.1 FORMAT OF THE CONFIGURATION TEMPLATE

The configuration template consists of two XML files:

⇒ install.xml: Plugin configuration-settings
⇒ search-properties.xml: Advanced search configuration

INSTALL.XML

The configuration template “install.xml” is an XML file with the following format:

XML element path	Description
oladdin	Root-element
oladdin.userSettings	**User Settings** ⇒ **culture**: Plugin language ⇒ **format**: Version (cannot be changed!) ⇒ **writeResponse**: “true“ if the request/response must be recorded in the log file
oladdin.connection	**Verbindungseinstellungen** ⇒ **repositoryRoot** → “site“ for “Search sites", → “complete“ for “Search all of Alfresco“ ⇒ **curl**: Alternate path for curl.exe (Can be left empty if Kerberos authentication is turned off) ⇒ **type**: Type of authentication. Supports: ○ basic: Basic authentication ○ NTLM: NTLM – SSO ○ Kerberos: Kerberos SSO ⇒ **login**: Login - Username ⇒ **alfrescoUrl**: URL of the Alfresco server (e.g.: http://localhost:8080) ⇒ **shareUrl**: URL of the Share server (optional if Share is installed on another server) ⇒ **appAlfrescoName**: Name of the Alfresco Web Application ⇒ **appShareName**: Name of the Alfresco Web Application
oladdin.archiving	**Standard archiving settings** ⇒ **asLink** → “true”, if the option “Email text and attachments as Link“ should be activated, → “false“, if it should not be activated. ⇒ **extractAttachment** → “true”, if the option “Save attachments as separate documents" should be activated, → “false”, if it should not be activated
oladdin.archiveStrategy	**Additional archiving settings** ⇒ **type** Contains the value for the selection menu, “Archiving settings”. ○ “use-default-archiving“: The default settings in Alfresco are used ○ “open-archiving-dialog“: Show settings when

	archiving: This allows you to select how each individual email should be archived. ○ "open-archiving-with-metadata-dialog": Enter metadata when archiving: This setting specifies whether the emails are to be tagged during archiving.
oladdin.logging	**Log settings** ⇒ **enable** → "true" if logging should be activated, → "false" if logging should not be activated ⇒ **level** Defines the level of detail for log files → "error": Only error messages are logged → "warning": Error messages and warnings are logged → "info": Error messages, warnings and information messages are logged
oladdin.extended	**Additional archiving settings** ⇒ **webUriSchema:** Contains the value for the setting for "Use WEB URIs for" ○ "share.schema": Share URIs are used ○ "web.client.schema": Alfresco Explorer URIs are used ⇒ **dndPriority:** Contains the values for the setting: "Drag & drop priority" ○ document: Default drag & drop as binary document ○ document-link: Default drag & drop as HTTP link ○ pdf: Default drag & drop as binary PDF document ○ pdf-link: Default drag & drop as HTTP link to the PDF document ⇒ **siteStrategy:** Contains the value for the setting "Navigation to the sites". ○ "all-sites": All public sites are displayed ○ "my-sites": Displays only sites in which the user is a member ○ "favourite-sites": Only the user's favourite sites are displayed ○ "by-server": The default settings in Alfresco are used
oladdin.help	**User manual configuration** ⇒ **language:** Language of the user manual

	→ “no” Norwegian → ”en“ English → "de“ German ⇒ **location** → URL for retrieving the user manual

Example – install.xml:

```
<?xml version=“1.0“ encoding=“utf-8“?>
<oladdin>
<userSettings culture="de-DE" format="1.0" writeResponse="False">
    <connection
        alfrescoUrl="http://localhost:8080"
        shareUrl=""
        timeout="200"
        appAlfrescoName="alfresco"
        appShareName="share"
        repositoryRoot="site" />
    <archive
        asLink="false"
        extractAttachment="false" />
    <archiveStrategy
        type="use-default-archiving" />
    <logging
        enable="false"
        level="error"
        folder="" />
    <extended
        webUriSchema="share.schema"
        dndPriority="document"
        siteStrategy="by-server"/>
    <help language="no" location="http://opensource.westernacher.com/wp-
content/uploads/2012/11/Operating-Manual_Lotus-Notes-Integration.pdf" />
    <help language="en" location="http://opensource.westernacher.com/wp-
content/uploads/2012/11/Operating-Manual_Lotus-Notes-Integration.pdf" />
    <help language="de" location="http://opensource.westernacher.com/wp-
content/uploads/2012/11/Bedienungsanleitung_Lotus-Notes-Integration.pdf" />
</userSettings>
</oladdin>
```

SEARCH-PROPERTIES.XML

The configuration template “search-properties.xml” is an XML file with the following format:

XML element path	Description

search-properties	Root-element
search-properties.search-property	Parent element for a search parameter
search-properties.search-property.name	Model name of the Alfresco property that is to be used for the search (e.g. cm:description, cm:author, …). IMPORTANT! cm:name does not require any additional configuration. This is a standard search parameter that is always displayed.
search-properties.search-property.label.en	Display name if English was selected as the plugin language
search-properties search-property.label.de	Display name if German was selected as the plugin language
search-properties search-property.label.no	Display name if Norwegian was selected as the plugin language
search-properties search-property.type	Type for the validation of the entries. Currently the following are supported: string, int, date, daterange

Example – search-properties.xml:

```
<?xml version="1.0" encoding="utf-8"?>
<search-properties>
  <search-property>
    <name>cm:name</name>
    <type>string</type>
    <label>
      <en>Name</en>
      <de>Name</de>
      <no>Name</no>
    </label>
  </search-property>
  <search-property>
    <name>cm:content</name>
    <type>string</type>
    <label>
      <en>Content</en>
      <de>Inhalt</de>
      <no>Content</no>
    </label>
  </search-property>
  <search-property>
    <name>wpsmail-v2:to</name>
    <type>string</type>
    <label>
      <en>Sent to</en>
      <de>Gesendet an</de>
      <no>Sent to</no>
    </label>
```

```
 </search-property>
 <search-property>
  <name>wpsmail-v2:subject</name>
  <type>string</type>
  <label>
   <en>Subject</en>
   <de>Betreff</de>
   <no>Subject</no>
  </label>
 </search-property>
 <search-property>
  <name>wpsmail-v2:date-sent</name>
  <type>daterange</type>
  <label>
   <en>Mail sent</en>
   <de>Gesendet am</de>
   <no>Mail sent</no>
  </label>
 </search-property>
</search-properties>
```

4.3.2 USING A CONFIGURATION TEMPLATE DURING INSTALLATION

If you would like to automatically import a configuration template when calling up the configuration dialogue for the first time, you need to store a configuration template in the installation directory of the Lotus Integration with the name 'install.xml'. This is possible for both a local and a remote-site installation.

4.4 LICENSE MANAGEMENT FOR THE LOTUS NOTES E-MAIL-MANAGER

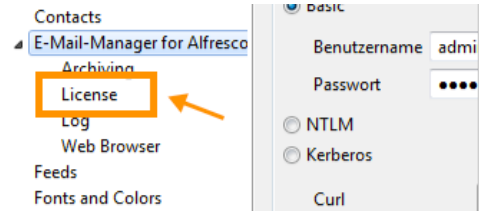
If you installed the full version or a trial version on your own server, the licenses will be managed in Alfresco Share. See **8.3 Email Licenses**

If you are testing a cloud-based, trial version of the plug-in you have to proceed with the following steps.

Open the integration settings.

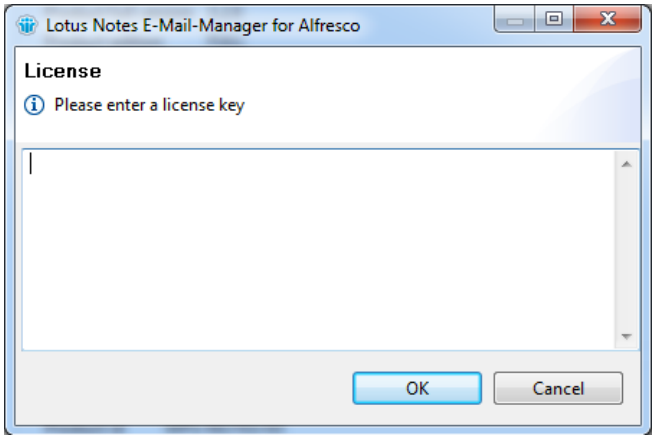
Alfresco Explorer

Open the settings fort he license:



License management in the plugin preferences

Choose „Enter license“, paste the license key into the input field and confirm via OK.



Input field fort he license key

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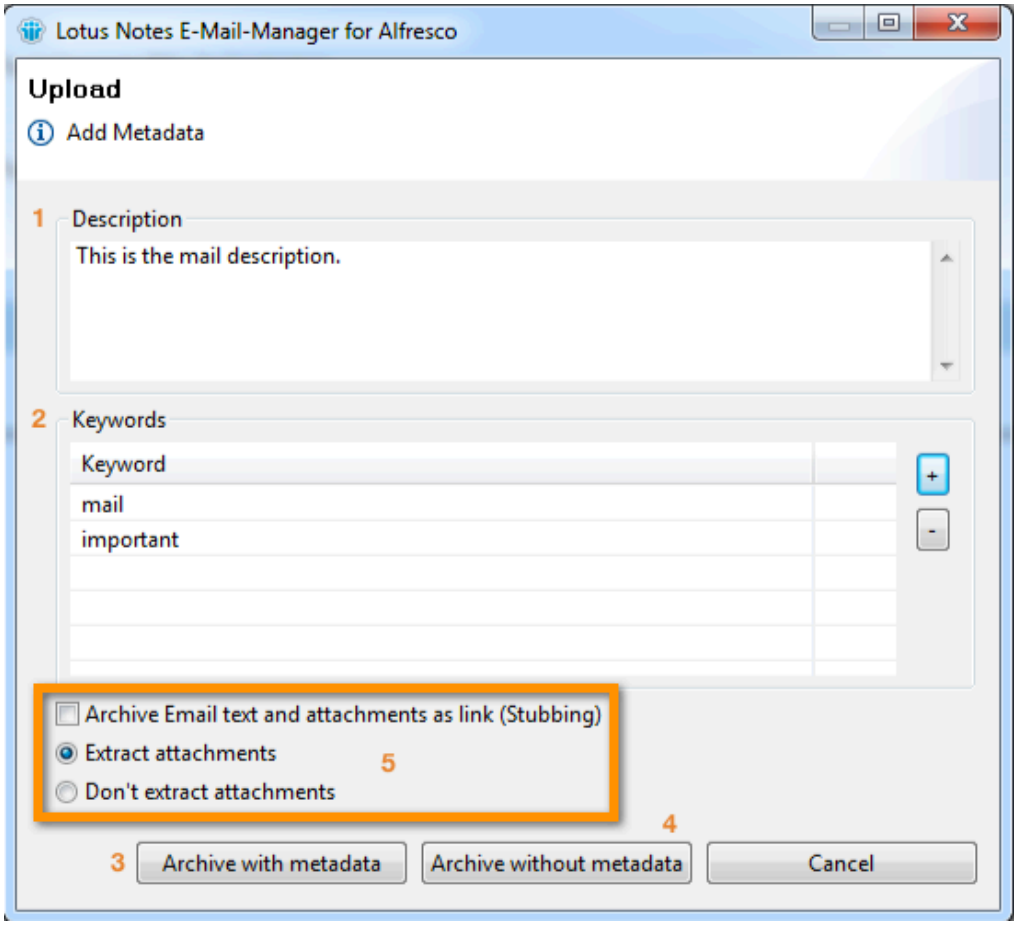
5 EMAIL ARCHIVING

You can drag Lotus Notes emails, dates, Notes documents and attachments directly from the emails into an Alfresco directory. Drag & drop not only works from Lotus Notes, but also from every file browser (such as Windows Explorer).

5.1 DRAG & DROP EMAILS INTO A DIRECTORY IN ALFRESCO EXPLORER

After being dragged and dropped into a directory in Alfresco Explorer, the email is saved in Alfresco. If entry of metadata was configured, a dialogue box appears before transferring to Alfresco. Here you can:

- ⇒ Enter an additional email description or
- ⇒ Enter keywords (tags)

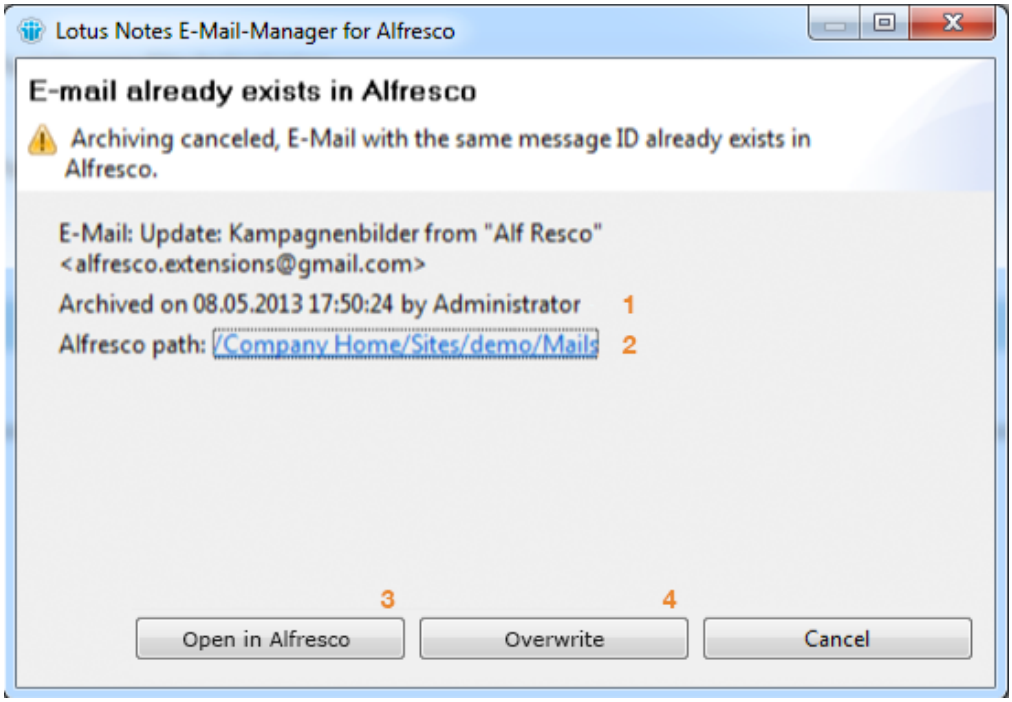


Window for entering an email description and keywords (tags)

1 Email description.
2 Keywords (tags).
3 Archive with entered metadata.
4 Archive without additional metadata.
5 Additional options for how emails should be saved.

5.2 DUPLICATE CHECK

A built-in duplicate check during email archiving facilitates collaborative work in Exchange mailboxes and prevents redundant data. The email ID of each email is checked to determine whether the email has already been saved in the same directory or on the same site. If yes, the following message appears during archiving:



Email conflict warning

1 Details about archiving.
2 A link to open the Internet browser and go directly to the folder contents web dialogue box.
3 Open: Opens the document with the default program.
4 Overwrite: Overwrites the email in Alfresco with the current version. This action is only activated if:
   a. The email to be overwritten is saved in the same directory,
   b. And if the overwriting of emails has been enabled in the settings of the Alfresco admin console.

5.3 DISPLAYING PREVIOUSLY ARCHIVED EMAILS

Emails that were not archived as links can be still be opened by double-clicking on them in Lotus Notes. The emails look the same as before archiving and can be used again.

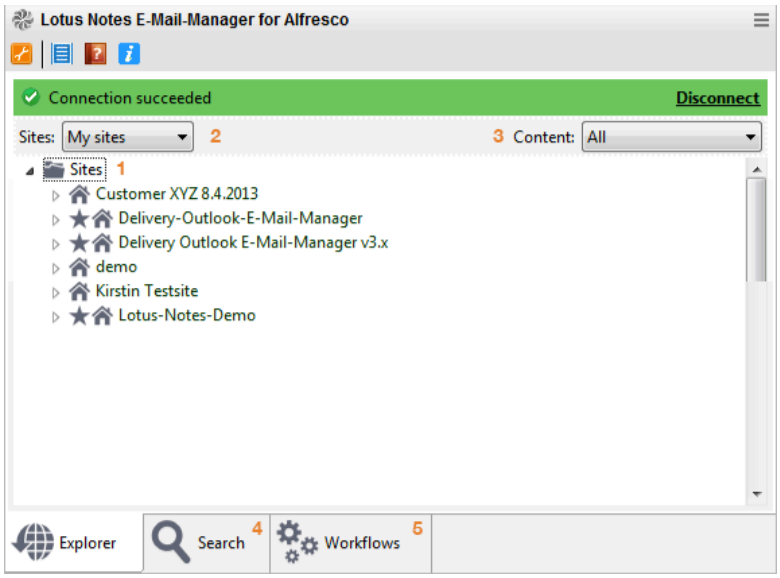
Emails that were stored as links (**4.1.1 Archive as link**) can be loaded into Lotus Notes over the Alfresco Web App via the links in the email.

6 ALFRESCO-EXPLORER

In the advanced settings, the user can define whether the folder tree of the Lotus Notes Alfresco Explorer displays by default only "Sites" or "All Alfresco".

The Lotus Notes Alfresco Explorer allows the user to conveniently navigate among the Alfresco directories and documents. Through the user's selection of "My favourite sites", "All public sites" and "My sites", they are given a clear overview of sites – even for a wide variety of public sites.

In addition, site content can be further filtered by "Favourite folders", "Favourite documents" and "Favourites" (i.e. both favourite documents and favourite folders).



Alfresco Explorer

1 Lotus Notes Alfresco Explorer starts with "Only sites" or "All Alfresco".
2 Select "My favourite sites", "All public sites" or "My sites".
3 Filter site content according to "Favourite files", "Favourite documents" or "Favourites".
4 Search tab: simple and advanced search for documents, sites and attachments.
5 Workflow tab: Start Alfresco workflows. See **6.7 Workflows**

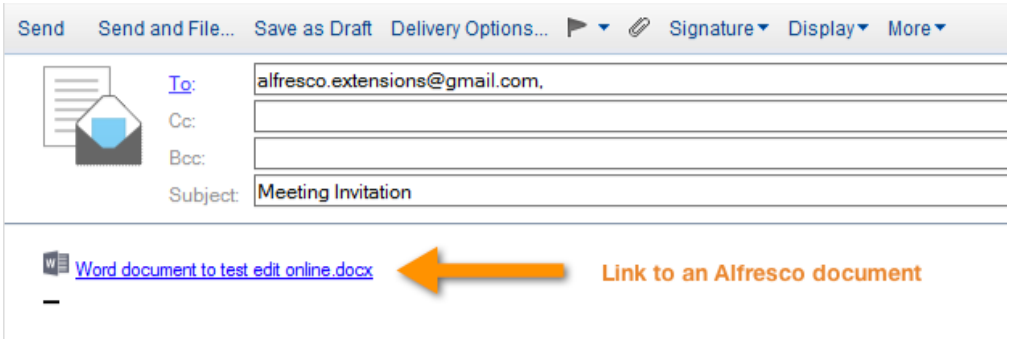
The context menu can be called up from every folder, document or attachment in Alfresco Explorer.

6.1 DRAG & DROP FROM ALFRESCO

For drag & drop from Alfresco, the following options are available:

⇒ Drag & drop as an Alfresco link
⇒ Drag & drop as a PDF (The document format must be supported by Alfresco.)
⇒ Drag & drop as a copy (download). Works for Lotus Notes emails (as an attachment), for every file browser as well as for every programme that supports file exchange via drag & drop: e.g. Microsoft Office.

Drag & Drop as an Alfresco link – While dragging one or more documents from Alfresco and pressing the Strg key, e.g. in a Lotus Notes email or a Microsoft Word document, an Alfresco link to this document will be placed in the text of the email or in the document.



Drag & Drop as an Alfresco link

Drag & Drop as PDF – When dragging one or more documents from Alfresco into an email while pressing the Strg and Shift keys, the document will be added as a PDF attachment. Documents can also be saved as a PDF file to any other place on the system by using the same shortcut keys.

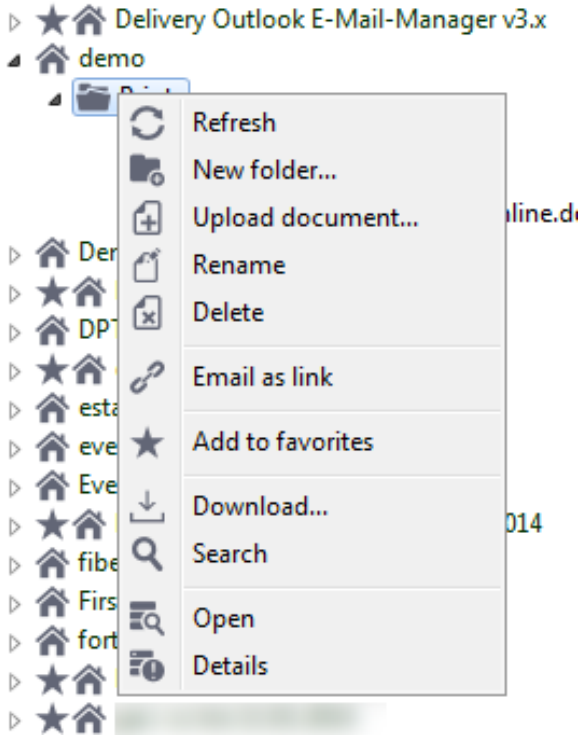
Drag & Drop as a copy – When dragging one or more documents from Alfresco into an Lotus Notes email, the document is added to the email as an actual file attachment. In the same way, you can also place content from Alfresco into a file browser (e.g. Windows Explorer). In the process, local copies, without reference to the Alfresco sources, are created.

Drag & Drop also works for every program that supports file exchange via Drag & Drop: e.g. Microsoft Office and Adobe Creative Suite.

Important: The Drag & Drop behavior can be adjusted.

6.2 CONTEXT MENU FOR FOLDERS

The context menu can be called up for every folder in Alfresco Explorer by right-clicking.



Context menu for Folders

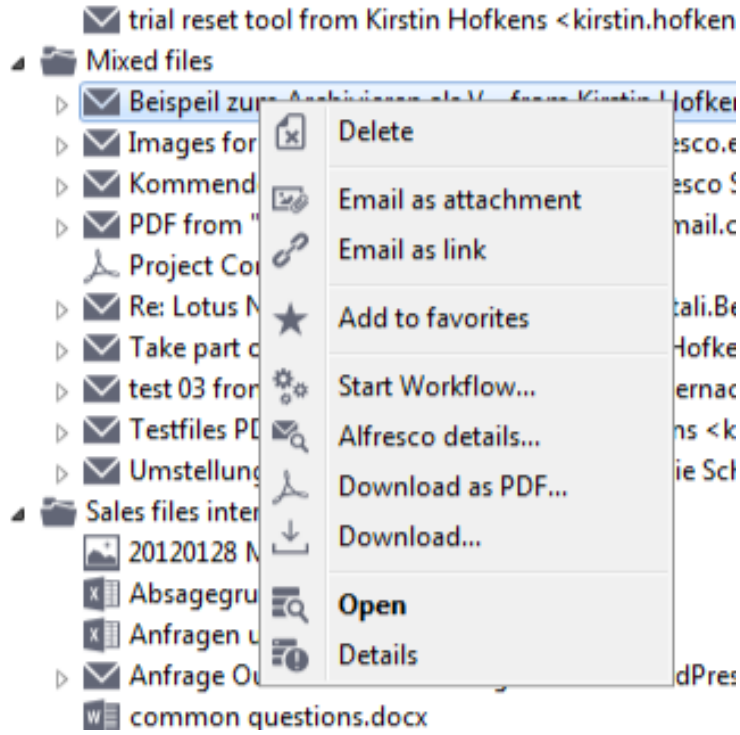
The following actions are available:

- ⇒ **Refresh**: Reload the folder content
- ⇒ **New Folder**: Creates a new folder in Alfresco.
- ⇒ **New document**: Upload a local file in Alfresco.
- ⇒ **Rename**: Rename folder.
- ⇒ **Delete**: Delete folder.
- ⇒ **Email as Link**: Creates a new email with a HTTP link to this folder.
- ⇒ **Add to favorites**: Bookmarks this folder as a favourite folder.
- ⇒ **Download**: Download the complete folder with all contents and subdirectories.
- ⇒ **Search**: Opens the search in the Lotus Notes E-Mail-Manager so that a search is conducted only in this folder.
- ⇒ **Open**: Opens the Internet browser and goes directly to the folder contents web dialog.
- ⇒ **Details**: Opens the default browser (or Internet Explorer) and goes directly to the folder details web dialog.

The action, 'Email as link' can be used for multiple folders at once. Select the folders while holding down the Shift key or Strg key.

6.3 CONTEXT MENU FOR EMAILS

The context menu can be called up for every email in Alfresco Explorer by right-clicking.



Context menu for emails

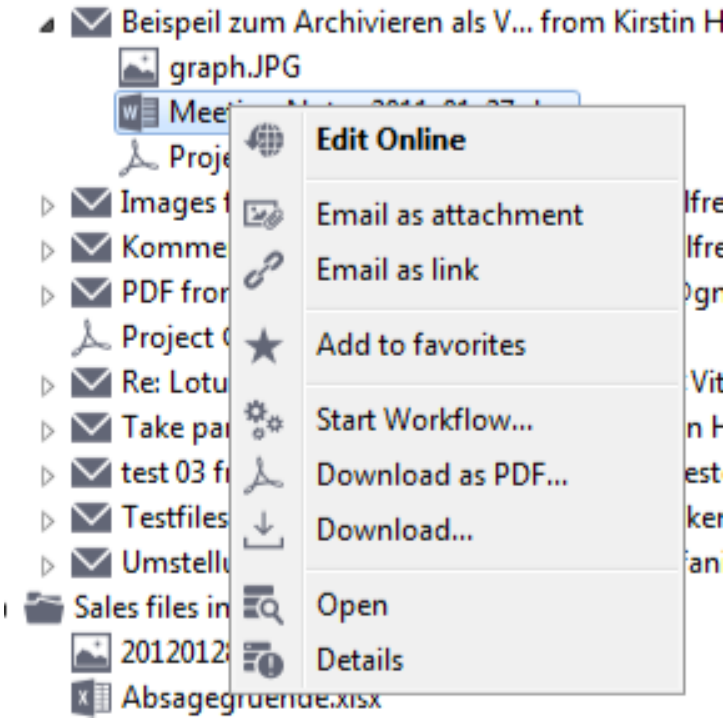
The following actions are available:

- ⇒ **Delete**: Delete document.
- ⇒ **Email as Attachment**: Creates a new email with this email attached.
- ⇒ **Email as Link**: Creates a new email with this email as an HTTP link.
- ⇒ **Add to favorites**: Bookmarks this email as a favorite document.
- ⇒ **Start Workflow**: Start a workflow for this document in the E-Mail Manager.
- ⇒ **Alfresco Details**: Shows, among other details, by whom and when the email was archived.
- ⇒ **Download as PDF**: Document is converted to PDF format and can be saved locally or attached to a new email.
- ⇒ **Download**: Save document locally.
- ⇒ **Open**: Opens the email in Lotus Notes.
- ⇒ **Details**: Opens the default browser (or Internet Explorer) and goes directly to the document details web dialog.

The actions, 'Email as Attachment' and 'Email as Link' can also be used for multiple emails at once. Select the emails while holding down the Shift key or Strg key.

6.4 CONTEXT MENU FOR EMAIL ATTACHMENTS

The context menu can be called up for every email attachment in Alfresco Explorer by right-clicking. Double-click to open an email in the 'Edit online' mode.



Context menu for email attachments

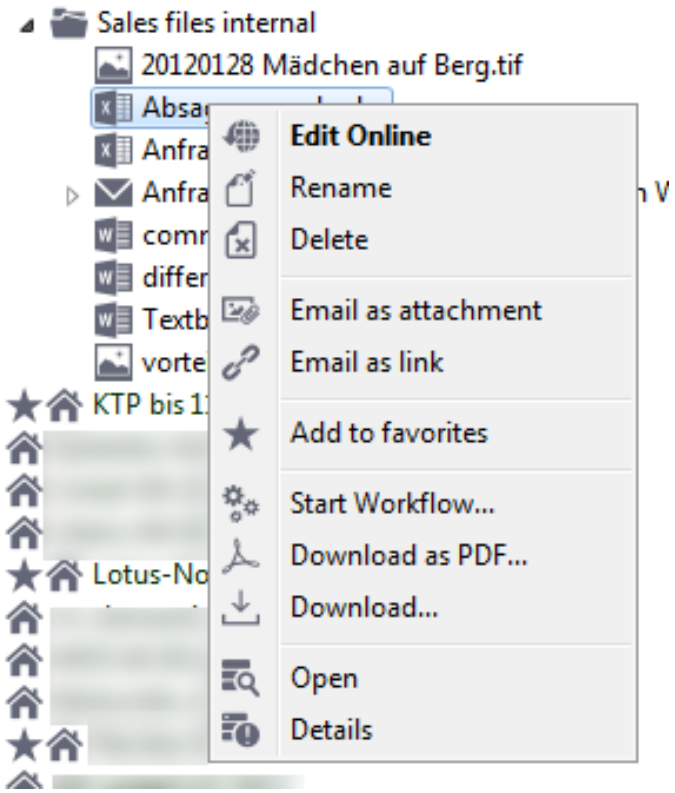
The following actions are available:

- ⇒ **Edit online**: As long as an employee is working on a document, it is blocked from use by other users.
- ⇒ **Email as Attachment**: Creates a new email with this email attached.
- ⇒ **Email as Link**: Creates a new email with this email as an HTTP link.
- ⇒ **Add to favorites**: Bookmarks this email as a favorite document.
- ⇒ **Start a workflow**: Start a workflow for this document.
- ⇒ **Download**: Save document locally.
- ⇒ **Download as PDF**: Convert document to PDF format and save it locally or attach it to a new email.
- ⇒ **Download**: Save document locally.
- ⇒ **Open**: Open the document with the default programme.
- ⇒ **Details**: Open the Internet browser and go directly to the document details web dialogue box.

The actions, 'Email as Attachment' and 'Email as Link' can also be used for multiple emails at once. Select the emails while holding down the Shift key or Strg key.

6.5 CONTEXT MENU FOR DOCUMENTS

For documents that were loaded into Alfresco separately, for example with drag & drop, right-clicking brings up the same options as for email attachments, including the additional options of "Rename" and "Delete".



Context menu for documents

The following actions are available:

- ⇒ **Edit online**: as long as an employee is working on a document, it is blocked for other staff.
- ⇒ **Rename**: Assigns a different document name
- ⇒ **Delete**: Deletes the document
- ⇒ **Email as Attachment**: Creates a new email with this document attached.
- ⇒ **Email as Link**: Creates a new email with this document as an HTTP link.
- ⇒ **Add / Remove from favorites**: Adds or removes the document from the favorites list.
- ⇒ **Start Workflow**: Start a workflow for this document.
- ⇒ **Download as PDF**: Document is converted to PDF format and can be saved locally or attached to a new email.
- ⇒ **Download**: Save document locally.
- ⇒ **Open**: Opens the document with the default program.
- ⇒ **Details**: Opens the Internet browser and goes directly to the document details web dialog.

6.6 SEARCH IN ALFRESCO

The “Search” tab offers convenient searching of the contents or directories in Alfresco.
A distinction is made between:

- ⇒ a simple search and
- ⇒ an advanced search.

For every directory or document found using the search tab, both the context menu and drag & drop to and from Alfresco are available.

6.6.1 SIMPLE SEARCH

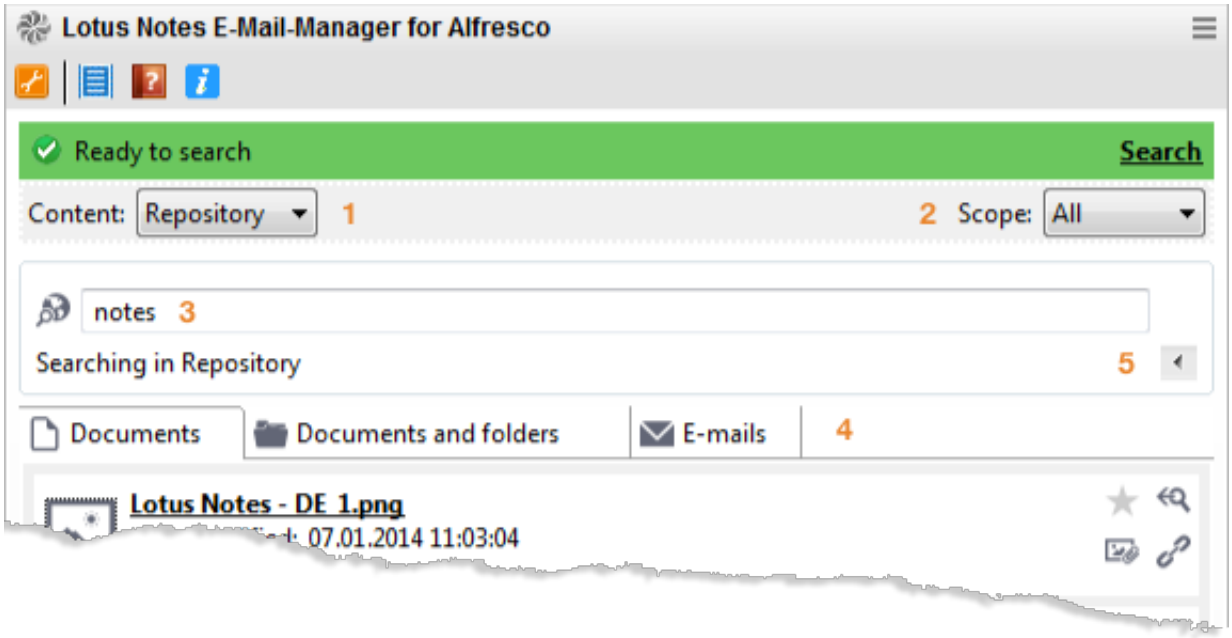
A simple search works in the same way as the search in Alfresco Share. The simple search supports the syntax of Alfresco FTS (Full Text Search) and allows you to:

- ⇒ Search the contents, properties and tags of the Alfresco data
- ⇒ Use logical operators such as AND, OR, and NOT
- ⇒ Group search conditions within brackets
- ⇒ Carry out search queries similar to Google, including mandatory and optional search terms
- ⇒ and much more…

You can find more details in the Alfresco documentation.

Below are a few example queries for a simple search:

- ⇒ test: Searches for occurrences of the word “test” (in the document contents and properties: name, title, description in documents and folders.)
- ⇒ test1 test2 : Searches for occurrences of the word test1 OR test2
- ⇒ test1 AND test2: Searches for occurrences of the word test1 AND test2
- ⇒ (test1 AND test2) OR (test3 AND test4) : Searches for occurrences of the word test1 AND test2 OR test3 AND test4
- ⇒ cm_title:test1 OR cm_description:test2 : Searches for the occurrences of the text “test1” in the property: title and “test2” in the property: Description
- ⇒ etc.



Simple search in Lotus Notes Alfresco Explorer

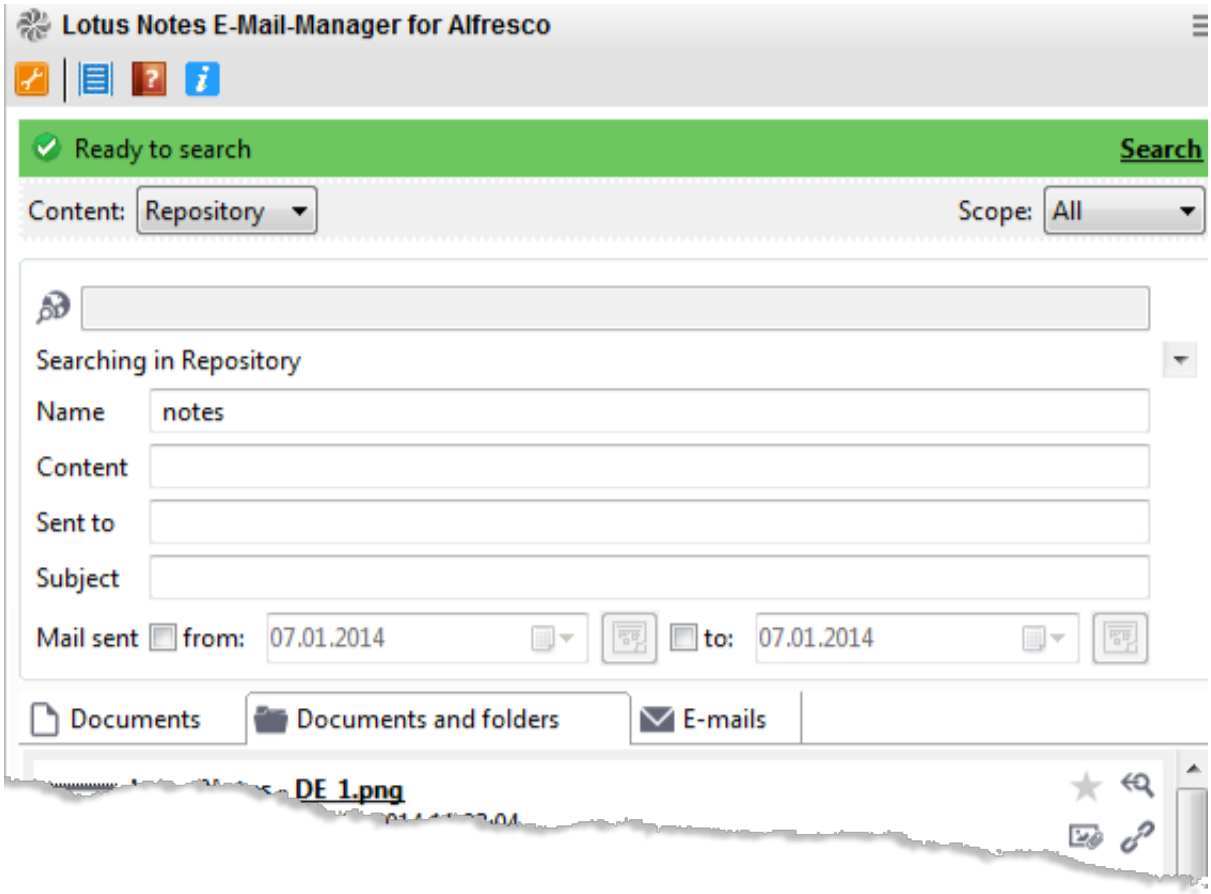
1 Input field for the search query.
2 Option to restrict the search area (repository, all sites, selected site).
3 Filter to determine whether documents, folders or both are found.
4 Alfresco folders found.
5 Alfresco documents found.
6 Select between "Simple search" or "Advanced search".

6.6.2 ADVANCED SEARCH

In the advanced search, switch the button (7) from simple search (see screenshot "Simple search in Lotus Notes Alfresco Explorer").

The advanced search offers the option to search within file names, email contents and subject lines as well as within a specified timeframe under "Sent on ... until".

WESTERNACHER
LOTUS NOTES E-MAIL-MANAGER
OPERATING MANUAL



Advanced Search in Lotus Notes Alfresco Explorer

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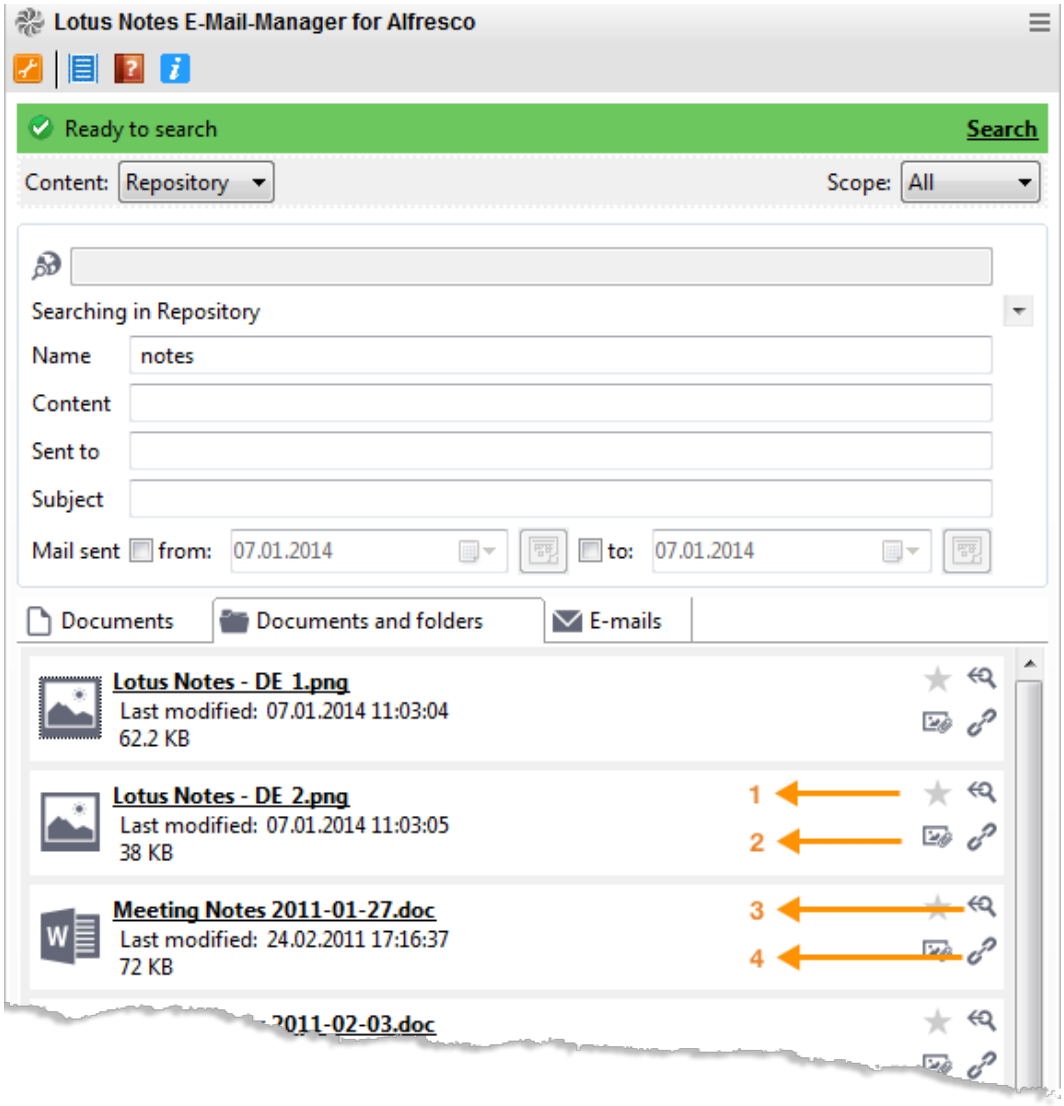
6.6.3 PRESENTATION AND USE OF THE SEARCH RESULTS

For every folder, document or email found using search, the user has multiple actions in the form of icons, as well as drag & drop, at his or her disposal. Of course, the preview also works for search results.



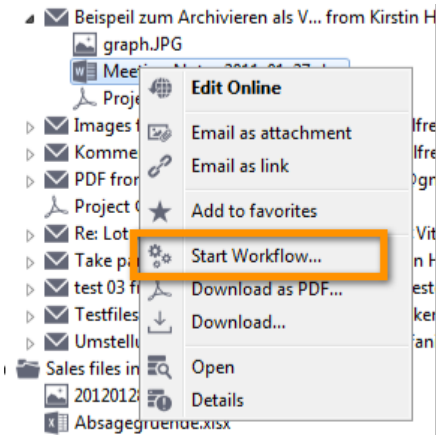
Search results and their possible uses

1. A click on this icon (1) bookmarks the document or folder as a favourite
2. Clicking on this icon (2) automatically opens a new email and inserts the document as an attachment
3. By clicking on this icon (3). the Lotus Notes Alfresco Explorer will open this exact document or folder. All other documents and folder actions remain available
4. Clicking on this icon (4) automatically opens a new email and inserts the document as a link

6.7 WORKFLOWS

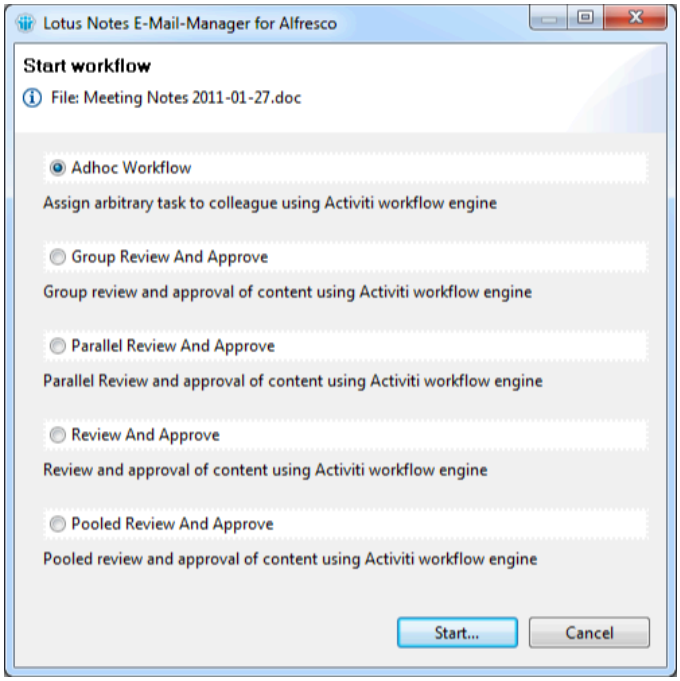
The Westernacher Lotus Notes E-Mail-Manager allows you to start the same workflows – as defined in Alfresco Share – directly from Notes.

6.7.1 START A NEW WORKFLOW

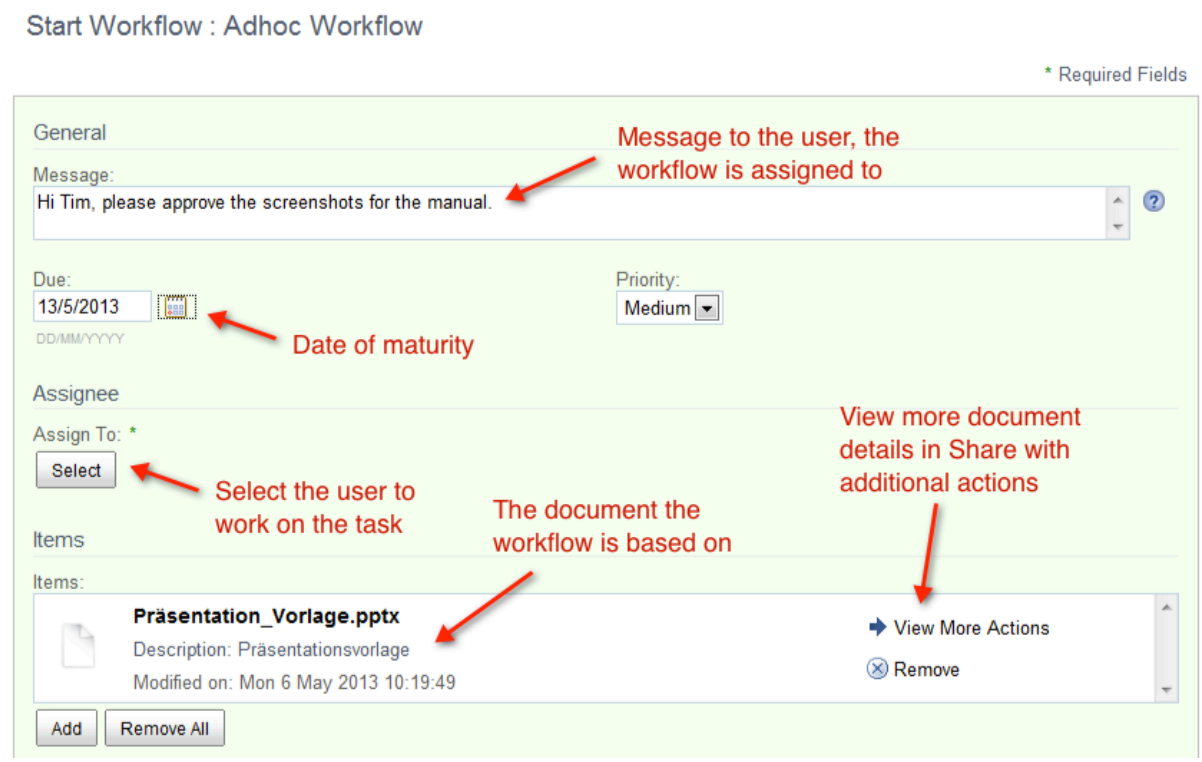


Step 1: Start a new workflow in the Lotus Notes Alfresco Explorer

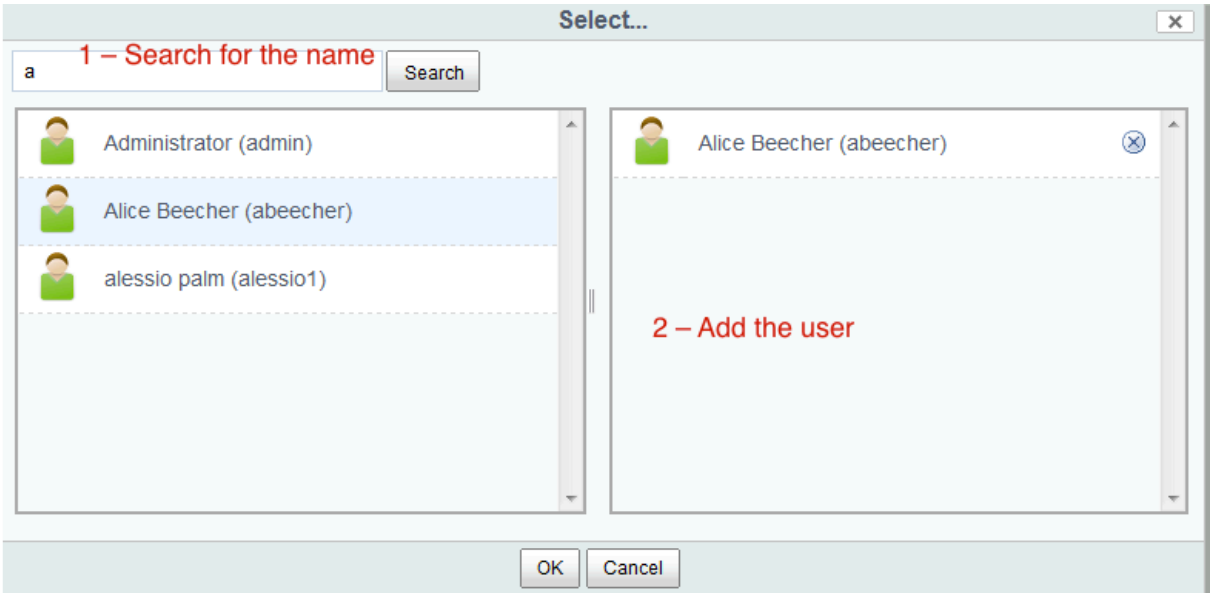
By default, Alfresco provides a set of workflows that can be expanded according to company needs. Please refer to the Alfresco user manual for more information. (Click here to view this online.)


Lotus Notes E-Mail-Manager for Alfresco
Start workflow
File: Meeting Notes 2011-01-27.doc
Adhoc Workflow
Assign arbitrary task to colleague using Activiti workflow engine
Group Review And Approve
Group review and approval of content using Activiti workflow engine
Parallel Review And Approve
Parallel Review and approval of content using Activiti workflow engine
Review And Approve
Review and approval of content using Activiti workflow engine
Pooled Review And Approve
Pooled review and approval of content using Activiti workflow engine
Start...
Cancel

Step 2: Select a workflow



Step 3: Adhoc Workflow (Example)

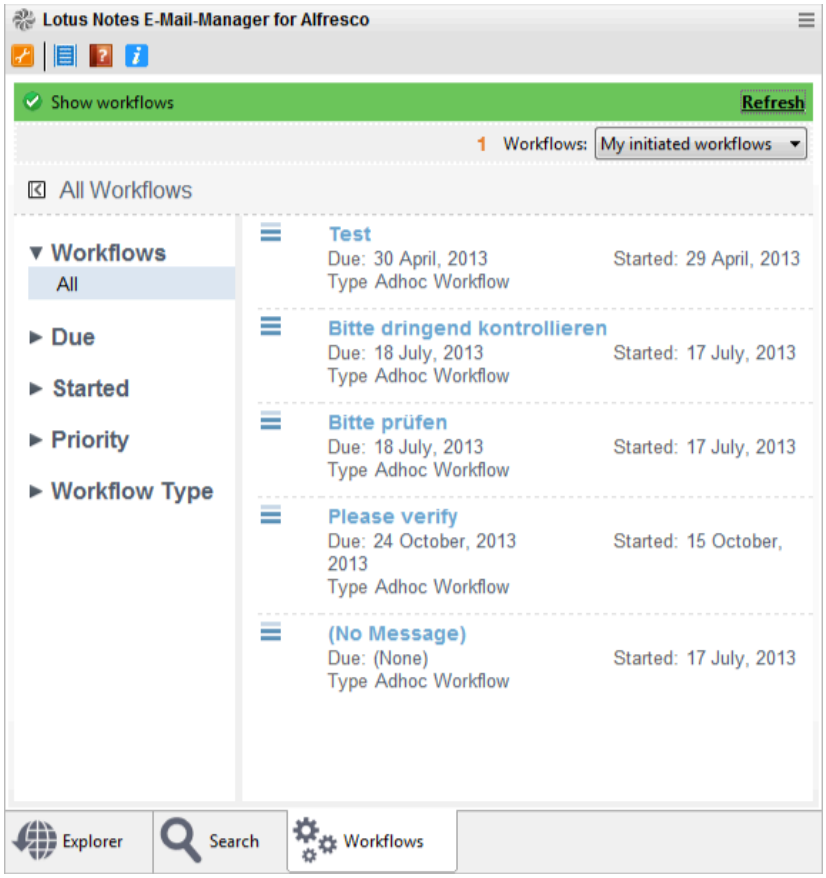


Step 4: Select a workflow manager (Example)

6.7.2 WORKFLOW OVERVIEW IN LOTUS NOTES ALFRESCO EXPLORER

Clicking on the "Workflow" tab opens an easily configurable list of workflows.

WESTERNACHER
LOTUS NOTES E-MAIL-MANAGER
OPERATING MANUAL



Workflows in Alfresco Explorer

Filters

1 Select whether “Started workflows” or “My tasks” should be displayed.
2 Workflows can be restricted using various filters.

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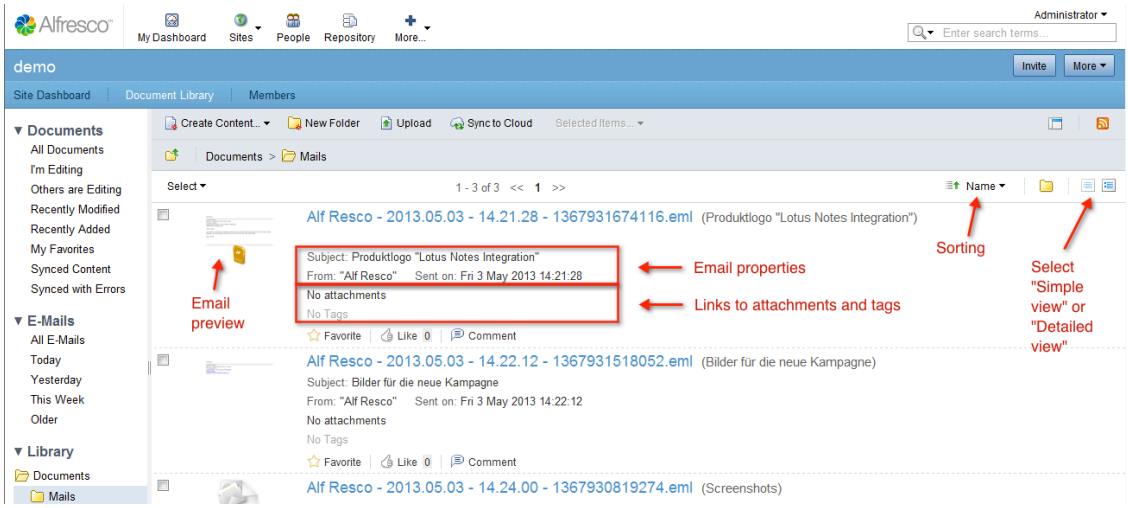
7 EMAIL MANAGEMENT IN SHARE

As is the case of normal Alfresco directories, there are two special views in Alfresco for archived emails:

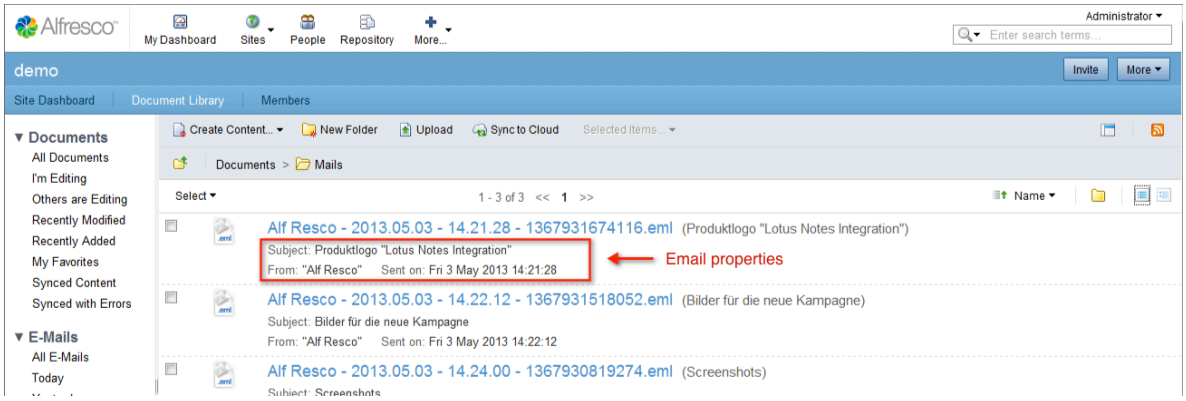
⇒ Detailed view
⇒ Simple view

7.1 DETAILED VIEW



Detailed view in Alfresco Share

7.2 SIMPLE VIEW



Simple view in Alfresco Share

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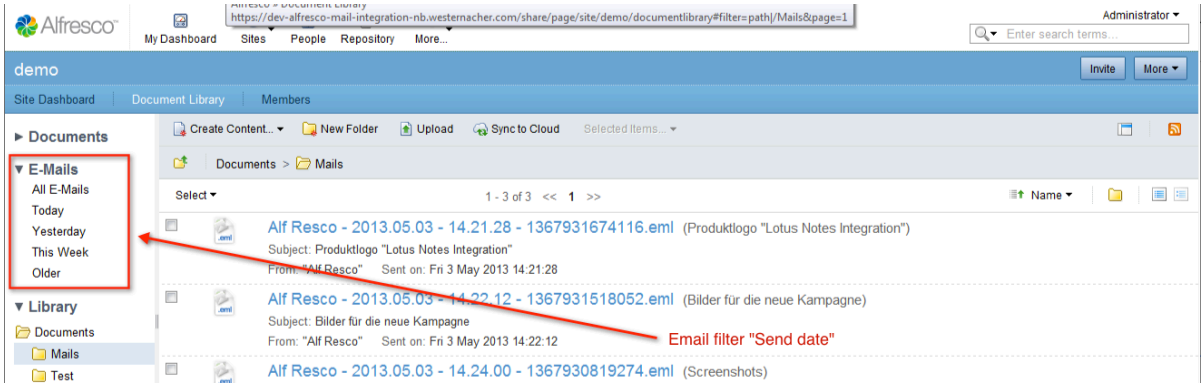
7.3 EMAIL FILTERS

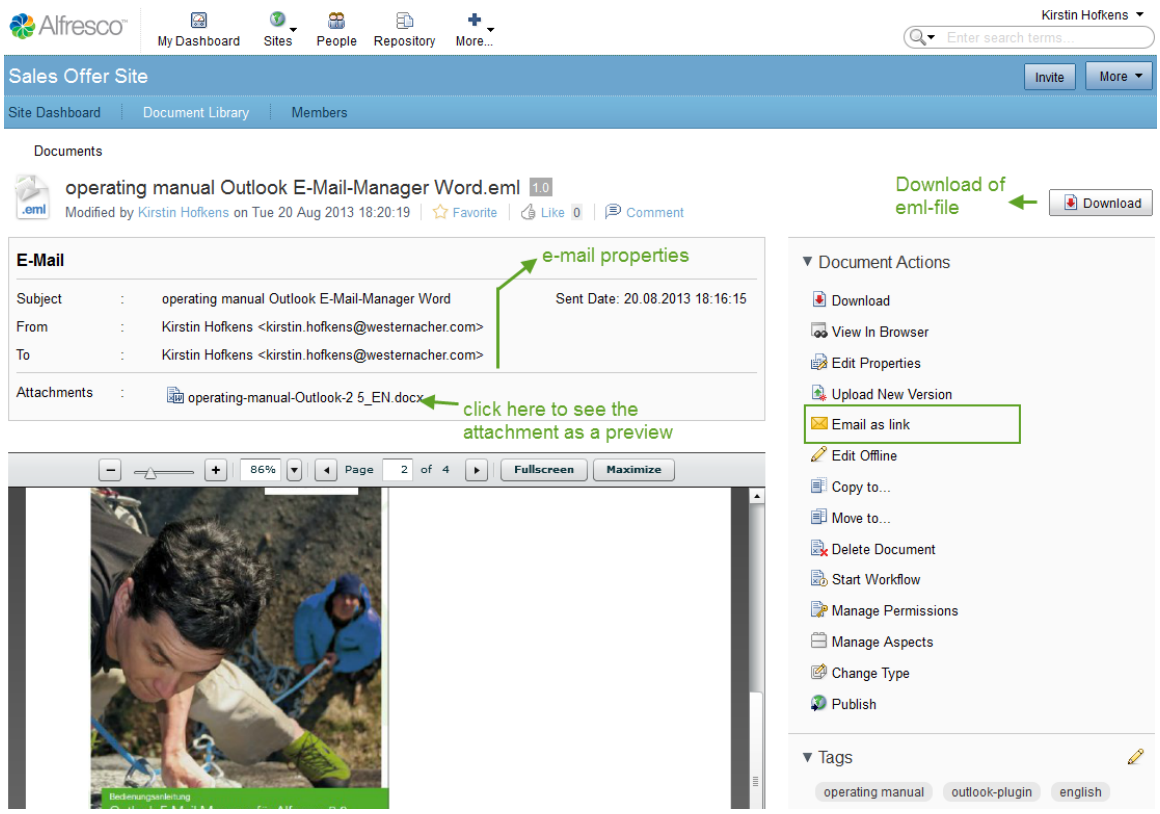
Email filters allow you to search for archived emails within sites or globally in Alfresco.



Email filters according to sent-date

7.4 DETAILED EMAIL VIEW

In contrast to the default behaviour in Alfresco, HTML and rich-text emails in Share are displayed as a colour preview in the detailed view.



Detailed email view in Alfresco Share

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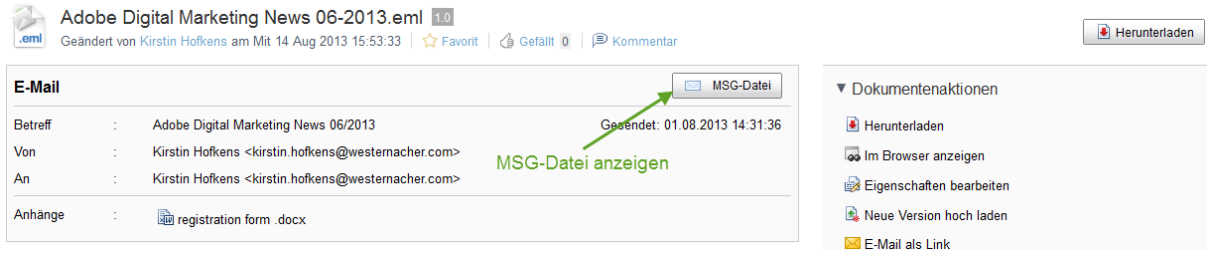
All email general data are available similar to the display of an email in Lotus Notes in a box above the email. The document actions offers the opportunity to attach the document to a new email as a link (E-mail a link (1).

Additionally, if a MSG file is saved, it can be opened via the "MSG file" button in the preview. All other options remain available.



Show MSG-File

7.5 EMAIL SEARCH IN ALFRESCO

You can access email search via Alfresco's 'Advanced search' screen.

Step 1: Select „Advanced Search"

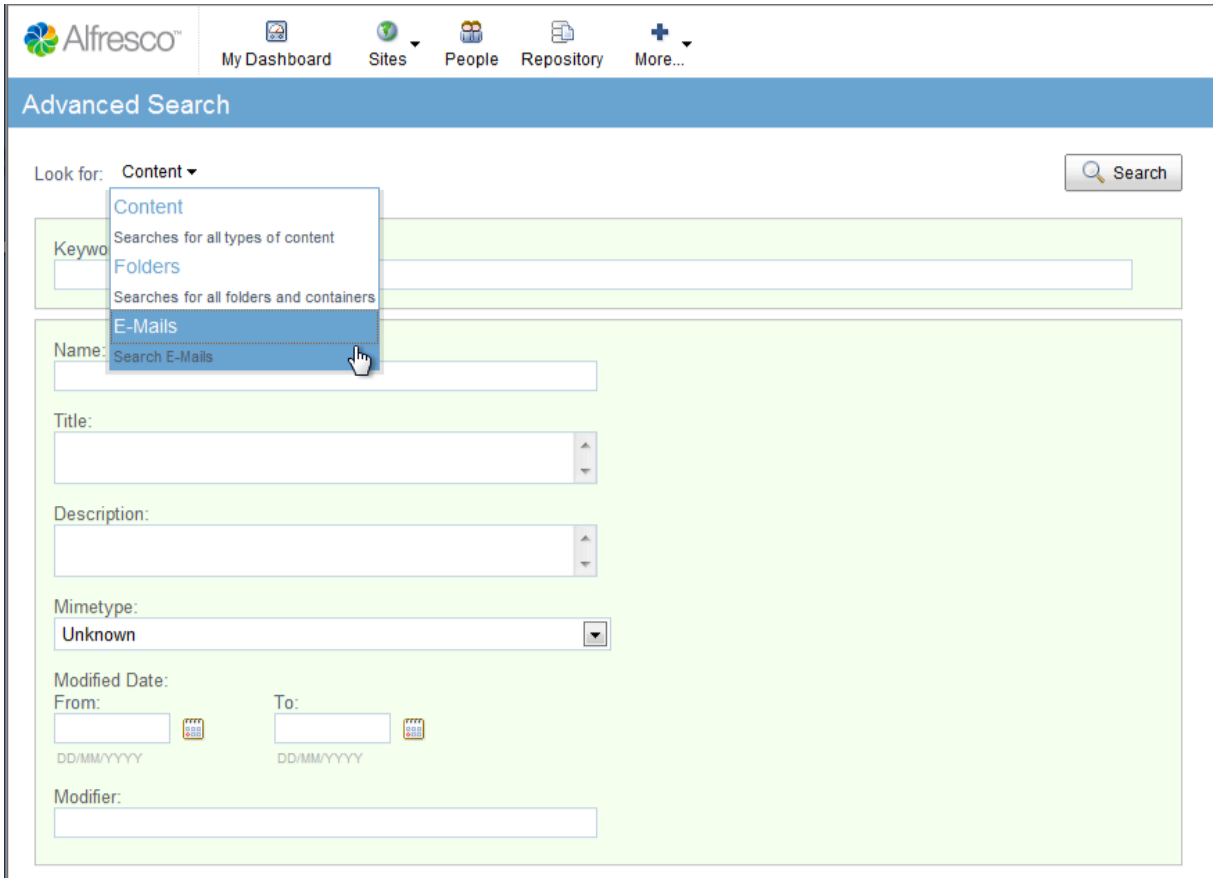
Westernacher Products & Services AG

Königstraße 26
70173 Stuttgart

Fon +49 711 722595 0
Fax +49 711 722595 99

Mail ecm@westernacher.com
Web ecm.westernacher.com

WESTERNACHER
LOTUS NOTES E-MAIL-MANAGER
OPERATING MANUAL



Step 2: Select the search criteria. In this example → emails

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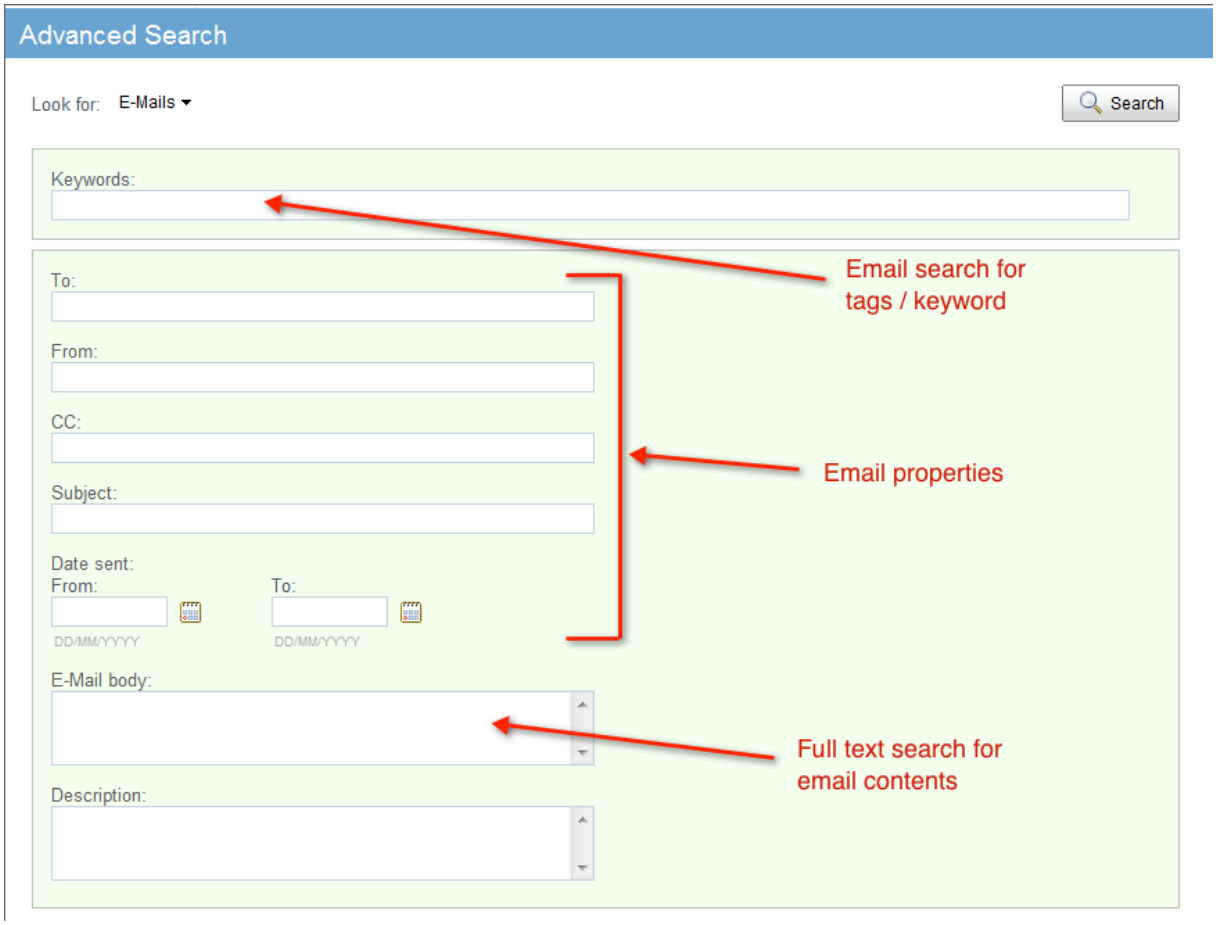
Web ecm.westernacher.com

Alfresco Platinum Partner

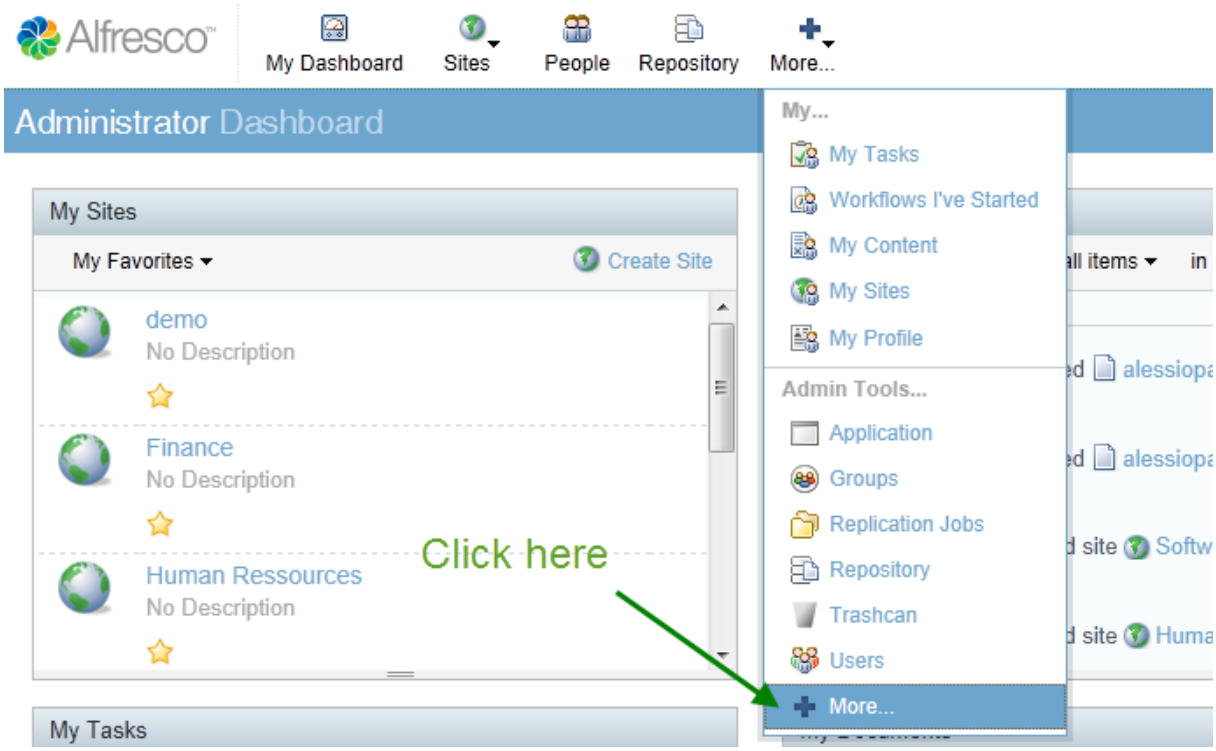


Step 3: Search options

8 EMAIL INTEGRATION SETTINGS FOR ADMINISTRATORS

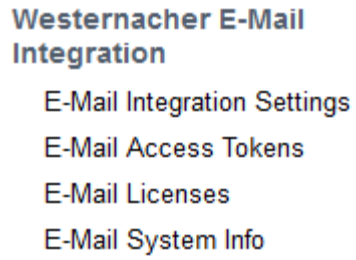
As administrator, you can configure some basic settings in Alfresco Share for the Westernacher Lotus Notes E-Mail-Manager.

WESTERNACHER
LOTUS NOTES E-MAIL-MANAGER
OPERATING MANUAL



Step 1: Open the email integration settings

The following settings are available (see the left side at bottom):



Step 2: Administrator areas in the Lotus Notes E-Mail-Manager

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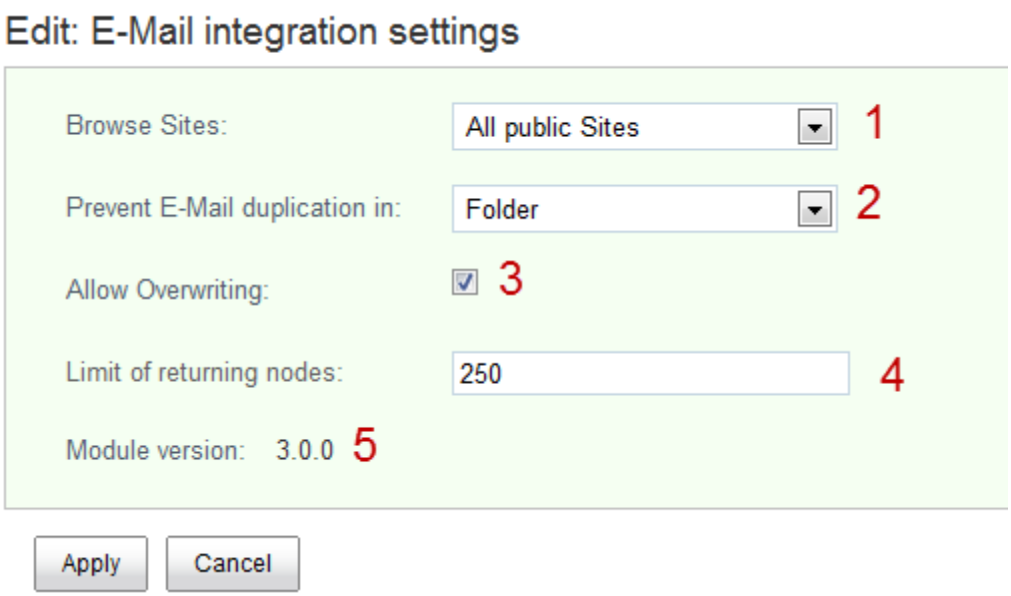
Alfresco Platinum Partner

8.1 EMAIL INTEGRATION SETTINGS

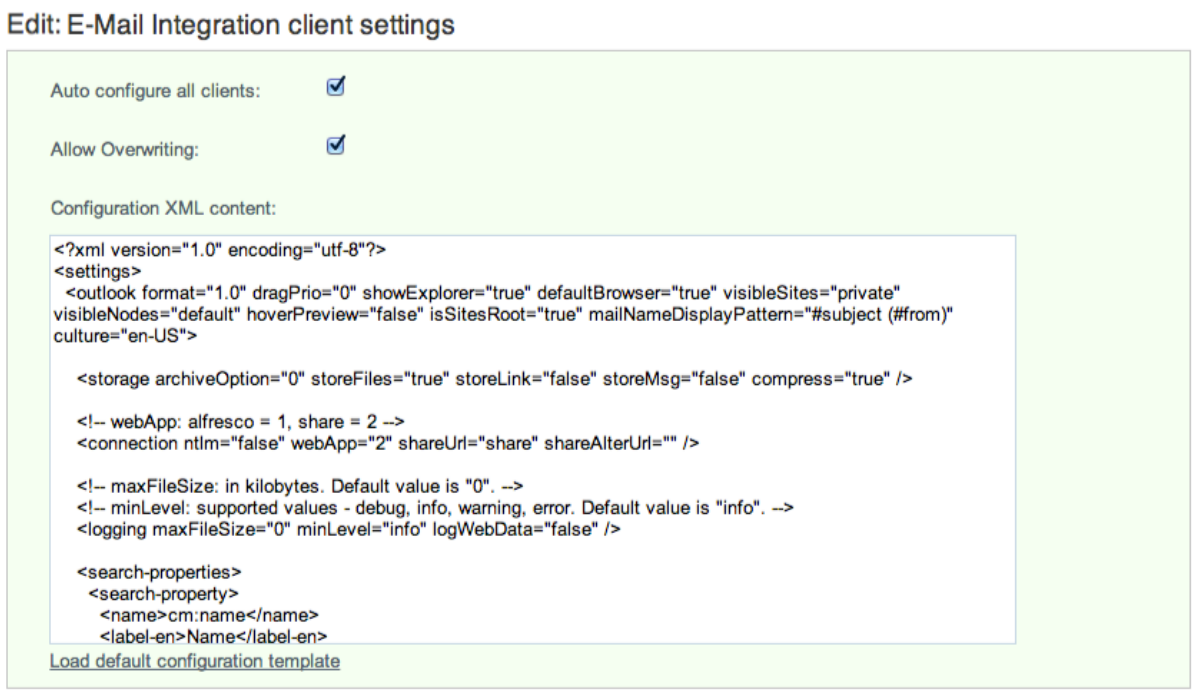


Available options in the integration settings

1 Option to specify the navigation area for Lotus Notes Alfresco Explorer. Select between “All public sites”, “My sites” and “Favourite sites”. This can be changed by the user at any time for his or her local Lotus Notes Alfresco Explorer.
2 Specifies whether the uniqueness of the documents to be stored (see **5.2 Duplicate check**) should be checked and at what level this occurs. Select between “None”, “All Alfresco”, “Site” and “Folder”.
3 Default setting: whether or not documents can be overwritten (See **5.2 Duplicate check**)
4 In order to optimise performance and maintain a clear overview, the number of sites, directories and documents displayed in Lotus Notes Alfresco Explorer can be limited. Entering a value of “0” removes any limit on the number of sites, directories and documents displayed.
5 Module version: displays the version of the Lotus Notes E-Mail-Manager.

8.2 AUTOMATIC CONFIGURATION OF CLIENTS VIA ADMIN-CONSOLE

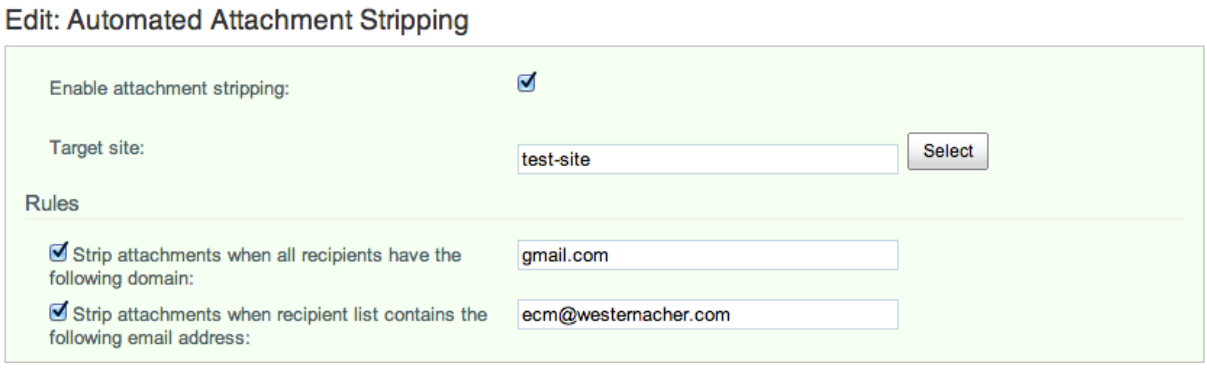
The Lotus Notes E-Mail-Manager clients can be configured through the Admin console via push functionality, this applies to both, the initial configuration as well as for changes to the existing settings.



Settings dialog for the server-side configuration of the Lotus Notes E-Mail Manager clients

8.3 AUTOMATED ATTACHMENT STRIPPING

Attachments used in a mail can be stored automated in a predefined folder in Alfresco. In the e-mail only the link to the attachment is available. External users can be granted a temporary right of access to the file.



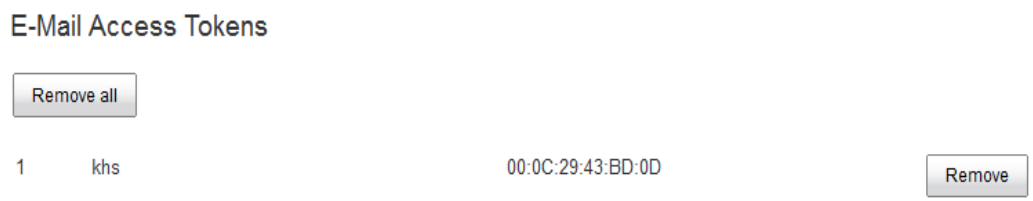
Settzings dialog fort he automated attachment stripping

To further automate this rules can be defined.

1 All recipients are members of a specified domain
2 In the list of recipients a specific mail address is available

8.4 EMAIL ACCESS TOKEN

In the list of access tokens, you can quickly see the number of logged in users and can also disconnect individual users.

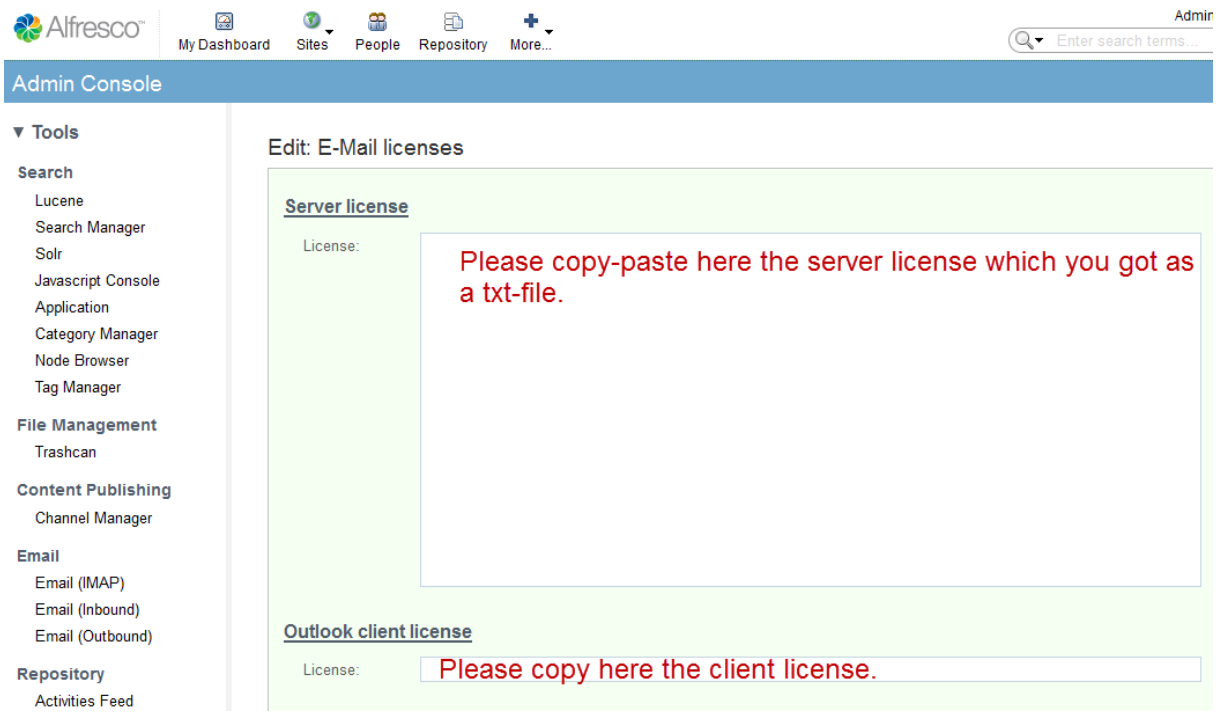


List of access tokens

8.5 EMAIL LICENSES

It is important to enter the license for the Lotus Notes E-Mail-Manager in Alfresco Share before you install the Lotus Notes client. Which AMPs need to be installed and where and where you can download them will be provided in a separate email.

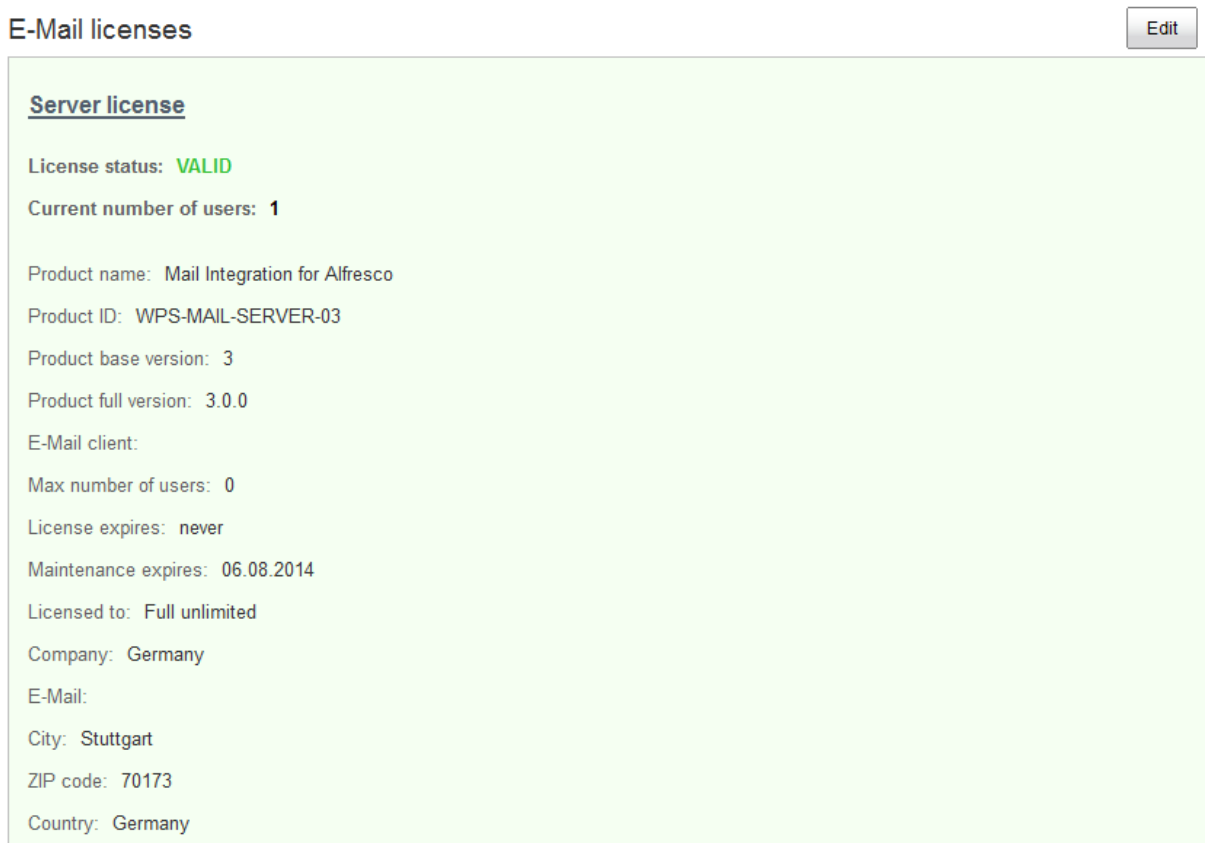
Please click on the "Edit" button to enter the server and client licenses for the Lotus Notes E-Mail-Manager.



License management in the Lotus Notes E-Mail-Manager

After you have confirmed this action by clicking the "Save" button, a screen will display your license

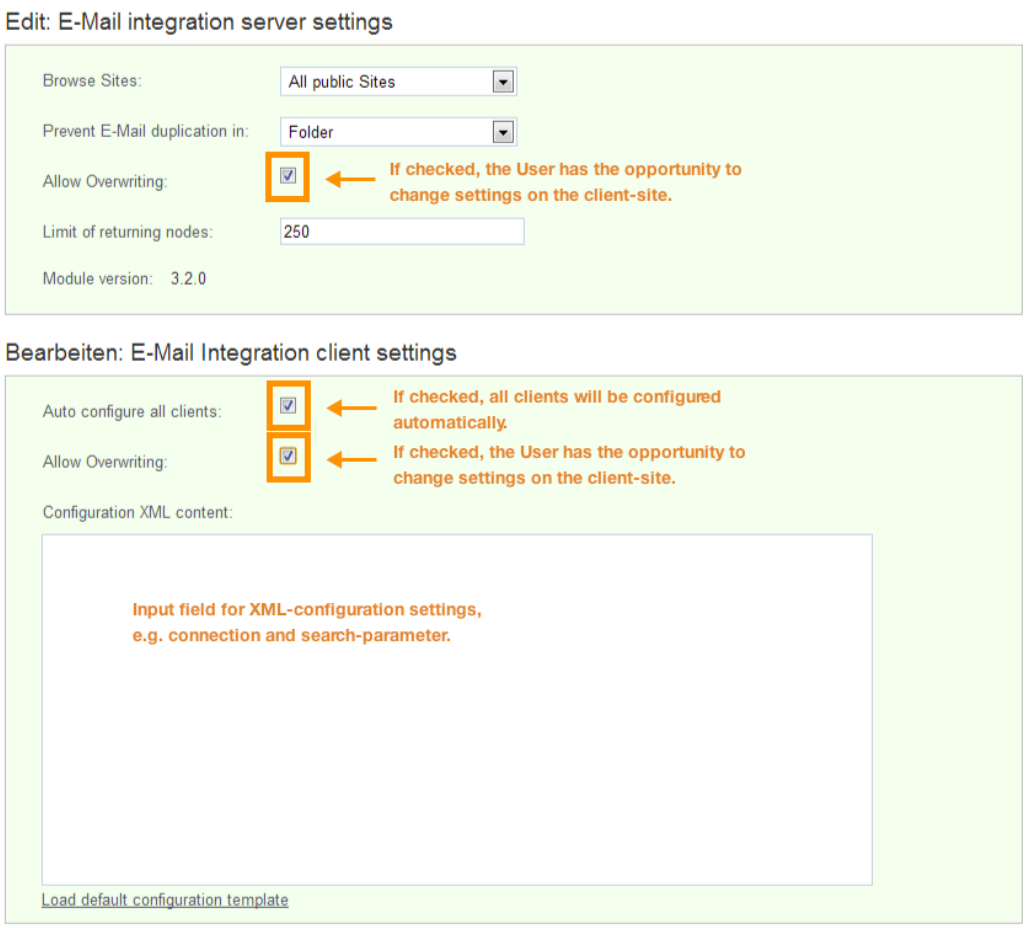
status, the number of current users, the maximum number of users, the product version of the plug-in and additional important information about your company license.



Overview of the license status

8.6 ADMINISTRATOR SETTINGS FOR THE E-MAIL-INTEGRATION

Via the menu item „Email Integration Settings“ the administrator has the option to define default settings for all connected clients.


Edit: E-Mail integration server settings
Browse Sites:
All public Sites
Prevent E-Mail duplication in:
Folder
Allow Overwriting:
If checked, the User has the opportunity to change settings on the client-site.
Limit of returning nodes:
250
Module version: 3.2.0
Bearbeiten: E-Mail Integration client settings
Auto configure all clients:
If checked, all clients will be configured automatically.
Allow Overwriting:
If checked, the User has the opportunity to change settings on the client-site.
Configuration XML content:
Input field for XML-configuration settings, e.g. connection and search-parameter.
Load default configuration template

Area for administrative settings

9 APPENDIX

9.1 BROWSER COMPATIBILITY

In general the Lotus Notes E-Mail-Manager works with every current browser. But in some cases the embedded browser does not work properly with Internet Explorer 9. By default this browser is used for the preview window, the workflow tab and for Alfresco Share. If you have problems using the Internet Explorer with the Lotus Notes E-Mail-Manager you have different opportunities to fix it.

1. if you are the Admin you could change the embedded browser to Mozilla Firefox via the Admin-Console
2. as user you could switch between Mozilla Firefox / Internet Explorer for the „preview window“ and the „workflow tab“ using the plugin preferences
3. as user you have the alternative to use an external webbrowser instead oft he embedded, to change this go to File → Preferences → Web Browser and set „Use the browser I have as the default for this operating system“